

## Student Record

Overview: The Student Record allows faculty, staff, and students to find all pertinent student information in one location.

### Version 1

**Release Date 1.11.16**

- Faculty/Advisors, Academic Staff, Department Chairs, Department Administrators, can view student personal record information (students only have access to their own)
  - Student Information
    - Name
    - Net ID
    - U Number
    - Email
    - Phone
    - Advisor
  - Academic Information
    - Department
    - Concentration
    - Enrollment Term
    - Catalog Year
  - Status
    - GPA
    - Residency
    - Reduced Rate
    - Degree Status
    - Probation
    - Holds
- Faculty Mentors, Academic Staff can view and edit all students; graduate students can view (their own) Student Database information
  - Degree/Specialty
  - Core/Concentration Exams
  - Special Projects
  - Thesis
  - Dissertation
  - Committee Members
  - Comments
- All users can view basic contact information of other students, faculty, and staff
- Department Chairs, Department Admins and Registration Services can assign students to their advisor

### Version 1.1

**Release Date 7.26.16**

- Placeholder for assignment of Graduate Advisor
- Graduate Advising Leadership can assign Graduate Advisors to students
- Graduate Advisors have a “My Advisee” list
- Graduate Advising Leadership can view report of students not assigned an advisor

## **Version 1.2**

**Release Date 8.4.16**

- View of all Contract Course (permits) approved forms

## **Version 1.3**

**Release Date 12.12.17**

- Graduate Advisors can edit Student Info/Faculty Mentor

## **Version 1.4**

**Release Date 01.31.18 (Q3 COPH Sprint 1 Review January 2018)**

- Graduate Advisors can update students' Graduate Advisor

## **Additional Features**

- Faculty Mentors and Graduate Advisors have access to a list of all mentees/advisees on their Profile page
- All Users can change profile name
- All Users can upload profile picture

## **Program of Study**

Overview: Program of Study allows initiation by advisor or student to map out the courses they will take during their degree program.

## **Version 1**

**Release Date 1.11.16**

- Available for MPH, MSPH, and MHA students, excluding Dual degree masters students and all doctoral students (PhD/DrPH)
- Student and Advisor can create and update Program of Study Forms
- Student and Advisor can electronically submit Program of Study Forms for registration approval
- Registration and Program Staff can electronically review and approve Program of Study
- Registration and Program Staff can use a live view of holds to check a student's registration status
- Can only have one Program of Study form in process at a time
- Able to view course co and prerequisites on the Program of Study form
- Able to view grade and credit hours on all completed courses
- COPH Administration can view active and inactive tasks and actions
- COPH Administration can view process metric reports

## **Version 1.1**

**Release Date 1.26.16**

- Department Chairs and Department Administrators have a read-only view of the Program of Study for all students in their department

## **Version 1.2**

**Release Date 2.17.16**

- Student U# visible in student information section of POS

## **Version 1.3**

**Release Date 4.15.16**

- Elective section allows for multiple placeholder courses (i.e., PHC 6934).
- Historical data updated for concentrations TCD and SFM

## **Version 2**

**Release Date 7.8.16**

- POS templates updated for MPH, MSPH, MHA, MPH/MHA
- POS templates allow for in-line electives within course sections

## **Version 2.1**

**Release Date 7.26.16**

- POS supports multiple entry of specific courses
- POS released for PHD/DRPH

## **Version 2.2**

**Release Date 8.4.16**

- Updated program notes
- Template for PIH 2016 corrected
- MPH/MHA POS – PHC 6945 is now found under “Shared Courses”

## **Version 2.3**

**Release Date 9.6.16**

- Notes field increased to 1800 characters

## **Version 2.4**

**Release Date 9.28.16**

- Updates to field experience and contract courses to be “electives”

## **Version 2.5**

**Release Date 10.12.16**

- Updated approval process to include Graduate Advisor (in place of Faculty Mentor)

## **Version 2.6**

**Release Date 3.13.17**

- Catalog year available for all Concentrations/Programs 2017/2018
- Electives with terms without specific courses added

## **Version 2.7**

**Release Date 6.19.17**

- Updated POS for 2017/2018 PhD, MSPH, MPH updates

## **Version 2.8**

**Release Date 4.3.18**

- AY 18-19 POS templates updated

## **Change of Advisor (updated to Faculty Mentor)**

Overview: Change of Advisor allows a student to electronically submit approval to change their advisor.

## **Version 1**

**Release Date 1.11.16**

- Students can electronically submit Change of Advisor Form
- Faculty/Advisor can electronically review and approve change of advisor requests
- COPH Leadership, COPH Administration can view active and inactive tasks and actions
- COPH Administration can view process metric reports

## **Version 1.1**

**Release Date 9.6.16**

- Rename all instances of Advisor to Faculty Mentor

## **Intake Form**

Overview: Faculty and staff can submit new applications or features for development consideration.

## **Version 1**

### **Release Date 1.11.16**

- Faculty and Staff can submit intake form for review
- Governance committee members can view approved intake forms
- Summary report available to CPH Leadership on intake form submissions

### **Version 1.1**

#### **Release Date 4.15.16**

- SARF added to the drop down box

### **Version 1.2**

#### **Release Date 5.31.16**

- Drop down selection – Student Portal Application updated to Student Record

## **Student Appointment Request**

Overview: Student Appointment Request allows department administrators, faculty, HR staff and accounting staff to electronically create and approve student appointments.

### **Version 1**

#### **Release Date 2.8.16**

- Department administrators can initiate a student appointment electronically
- Pre-populated with student basic information
  - Name
  - U number
  - Degree
  - Academic Department
  - Address, email, phone number
  - Residency
- Identifies other GEMS appointments (real time)
- Picker list for GEMS Department
- Picker list for Building
- Picker list for Appointment Type
  - Explanation of appointment type and required documents
- Picker list of undergraduate and graduate courses
- Ability to upload resume
- Automatic calculation of biweekly rate
- Funding Source
  - Easy pick for chartfields
  - If no project, requires manual entry
  - Automatic calculation of FTE and Pay Distribution
  - Ability to add or delete funding source
- Accountable Officer, Supervisor, Advisor (if needed), HR, and Accounting can electronically approve or deny requests

- Automatically notifies initiator of additional documents due to HR
- Student Appointment Request Record available after submitting
- Milestone bar available for tracking progress
- HR Leadership can reassign tasks
- COPH Administration can view process metric reports
- COPH Leadership, HR Leadership can view active and inactive tasks and actions

## **Version 1.1**

**Release Date 3.8.16**

- Separate funding lines for Appointment and Tuition
- Chartfields updated with ability to pick all "0's" from dropdown if not a project
- Department Chairs and Department Administrators have view access to all SARF records
- Research Administrators receive notification of a completed SARF
- Research Administrators have access to SARF records

## **Version 1.2**

**Release Date 4.15.16**

- Comment box available to Initiator
- HR can give partial pay periods, hours and hourly pay (decimals)
- Department Chairs and Department Administrators have access to SARF metric report

## **Version 1.3**

**Release Date 5.31.16**

- Appointment/Tuition descriptor next to approver role
- Research Administration access to SARF records and reports
- Add "HR action" column to Completed SARF report
- Updates to combo code requirement (at HR Review stage)

## **Version 1.4**

**Release Date 6.13.16**

- Allow for multiple roles to have single approval

## **Version 1.5**

**Release Date 7.8.16**

- Approvers can view their approved SARFs

## **Version 1.6**

**Release Date 7.26.16**

- TOEFL score validation removed

## **Version 1.7**

**Release Date 9.14.16**

- Updates to combo code – requested information required at the HR Leadership stage

## **Version 1.8**

**Release Date 1.06.17**

- Transition of view of completed student appointments
  - Created report – Completed Appointment Requests
- Viewable to anyone who is part of the processes; including initiator, supervisor, accountant, HR
- Identified Initiator on the approval history list

## **Version 1.9**

**Release Date 4.10.17**

- Puerto Rico has been added to List of States

## **Version 1.10**

**Release Date 6.19.17**

- Updated chartfield- project optional

## **Version 1.11**

**Release Date 7.10.17**

- N/A option available in state field
- Department Administrators can edit all completed SARFs

## **Version 1.12**

**Release Date 8.23.17**

- Dept Admin and Dept Chairs have access to all SARFs

## **Version 1.13**

**Release Date 9.5.17**

- Chartfields require users to enter a min of 4 characters

## **Version 1.14**

**Release Date 1.30.18**

- Dept Admin can edit completed ARFs
- Filters added to Completed ARFs Report
  - Student
  - Initiator

- Term/Year
- Research administrators and support staff now have access to the Completed ARFs Report

## **Version 1.15**

**Release Date 2.13.18**

- Filters added to the Export Completed Appointment Requests Report
  - Semester

## **Version 1.16**

**Release Date 2.27.18**

- Appointments Dashboard & Metrics Report- Average Completion Times created

## **Version 1.17**

**Release Date 4.3.18**

- Metrics Report- Rejections created

## **Non-Student Appointment Request**

Overview: Non-Student Appointment Request allows department administrators, faculty, HR staff and accounting staff to electronically create and approve appointments.

### **Version 1**

**Release Date 12.08.16**

- Department administrators can initiate a non-student appointment electronically
- Fields for basic employee information
  - Name
  - Address, email, phone number
  - U#
  - Identify current/past employee
- Picker list for GEMS Department
- Calendar selection of start and end date
  - Does not allow for pre-dated appointments
- Verify Work Authorization
- Picker list for Building
- Picker list for Appointment Type
- Fields based on selection of appointment type
- Ability to upload resume, position duties, funding plan
- Picker for supervisor
  - Populated email and GEMS ID
- Funding Source



- Easy pick for chartfields
- If no project, requires manual entry
- Automatic calculation of FTE and Pay Distribution
- Ability to add or delete funding source
- Automatic calculation of yearly salary, biweekly rate, or semester rate
- Accountable Officer, Supervisor, Department Chair, HR, and Accounting can electronically approve or deny requests
- Automatically notifies initiator of additional documents due to HR
- Tracking available in Appointment Request Task Report
- Initiator, HR, Accounting, Supervisor, Department Chair can view completed appointments in report: Completed Appointment Request Forms
- Milestone bar available for tracking progress
- HR Leadership can reassign tasks
- COPH Administration can view process metric reports
- COPH Leadership, HR Leadership can view active and inactive tasks and actions

## **Version 1.1**

**Release Date 1.06.17**

- Automatic population of fringe costs
- HR Leadership can export all Completed Appointment Requests

## **Version 1.2**

**Release Date 4.10.17**

- Puerto Rico has been added to List of States

## **Version 1.3**

**Release Date 6.19.17**

- Updated chartfield- project optional

## **Version 1.4**

**Release Date 7.10.17**

- N/A option available in state field

## **Version 1.5**

**Release Date 9.5.17**

- Chartfields require users to enter a min of 4 characters

## **Version 1.6**

**Release Date 11.14.17**

- Dept. Admin can edit all NARFs

## **Version 1.7**

### **Release Date 1.30.18**

- Dept Admin can edit completed ARFs
- Filters added to Completed ARFs Report
  - Employee
  - Initiator
  - Hiring Department
- Research Administrators and support staff now have access to the Completed ARFs Report
- Created Courses Not Initiated & Completed Report

### **Version 1.8**

#### **Release Date 2.13.18**

- Filters added to the Export Completed Appointment Requests Report
  - Employee

### **Version 1.9**

#### **Release Date 2.27.18**

- Appointments Dashboard & Metrics Report- Average Completion Times created
- GEMS ID/GEMS Record added to NARF Financial Information

### **Version 1.10**

#### **Release Date 4.3.18**

- Bi-weekly cost now excludes fringe
- Metrics Report- Rejections created

### **Role Editor**

Overview: COPH leadership can add faculty and staff to Archivum.

### **Version 1**

#### **Release Date 5.31.16**

- COPH Leadership can add faculty and staff to Archivum.

### **Version 2**

#### **Release Date 6.19.17**

- COPH Leadership can add accepted students to Archivum

## Contract Courses

Overview: Allows students to complete the permit process to register for contract courses.

### Version 1

#### Release Date 6.23.16

- Students can initiate the Special Project form electronically
- Pre-populated with student basic information
  - Name
  - U number
  - Degree
  - Academic Department
  - Concentration
  - Email
  - Reduced Rate Attribute
- Picker list for Semester
- Picker list for Special Project Faculty Mentor
- Text box provided for Competencies, Deliverables, and Abstract
- Link to CPH Competencies web page
- Ability to upload CITI Training Certificate
- Ability for Special Project Faculty Mentor to electronically approve Special Project
- Ability for Special Project Faculty Mentor to electronically deny Special Project and leave comments
- Milestone bar available for tracking
- Registration notified of Special Project form electronically
- Ability for Registration Staff to assign CRN
- Notification sent via email to student and special project faculty mentor when process is complete
- Post to student newsfeed when process is complete
- CPH Leadership can view Process Metrics

### Version 1.2

#### Release Date 8.4.16

- Students can initiate the Independent Study form electronically
- Pre-populated with student basic information
  - Name
  - U number
  - Degree
  - Academic Department
  - Concentration
  - Email
  - Reduced Rate Attribute
  - Faculty Mentor
- Picker list for Semester
- Picker list for Instructor
- Text box provided for Credit Hours, Description of Project and Method of Presentation
- Ability for Instructor to electronically approve Independent Study
- Milestone bar available for tracking
- Registration notified of Independent Study form electronically

- Ability for Registration Staff to assign CRN
- Notification sent via email to student and instructor when process is complete
- Post to student newsfeed when process is complete
- Copenhag Leadership can view Process Metrics
- Copenhag Administration and Department Administrators can view active and inactive tasks and actions

## Version 1.3

### Release Date 9.6.16

- Students can initiate the Directed Research form electronically
- Pre-populated with student basic information
  - Name
  - U number
  - Degree
  - Academic Department
  - Concentration
  - Email
  - Reduced Rate Attribute
  - Faculty Mentor
- Picker list for Semester
- Picker list for Faculty Mentor
- Picker list for Course Instructor
- Text box provided for Credit Hours
- Ability to upload HRP Training Certificate
- Information link for Human Research Protection Training
- Ability to upload Proposal File
- Ability for Faculty Mentor and Instructor to electronically approve Independent Study
- Milestone bar available for tracking
- Registration notified of Directed Research form electronically
- Ability for Registration Staff to assign CRN
- Notification sent via email to student and instructor when process is complete
- Post to student newsfeed when process is complete
- Copenhag Leadership can view Process Metrics
- Copenhag Administration and Department Administrators can view active and inactive tasks and actions

## Version 1.4

### Release Date 9.14.16

- Students can initiate the Specialized Study form electronically
- Pre-populated with student basic information
  - Name
  - U number
  - Degree
  - Academic Department
  - Concentration
  - Email

- Reduced Rate Attribute
  - Faculty Mentor
- Picker list for Semester
- Picker list for Faculty Mentor
- Picker list for Course Instructor
- Text box provided for Credit Hours
- Ability to upload Proposal file
- Ability to upload Proposal File
- Ability for Faculty Mentor and Instructor to electronically approve Independent Study
- Milestone bar available for tracking
- Registration notified of Directed Research form electronically
- Ability for Registration Staff to assign CRN
- Copenhaven Administration can view active and inactive tasks and actions
- Copenhaven Administration and Department administrators can view process metric reports

## **Version 1.5**

### **Release Date 10.12.16**

- Approval process updated to include graduate advisor for Special Project and Independent Study

## **Version 1.6**

### **Release Date 10.26.16**

- Students can initiate the Capstone form electronically
- Pre-populated with student basic information
  - Name
  - U number
  - Degree
  - Academic Department
  - Concentration
  - Email
  - Reduced Rate Attribute
  - Faculty Mentor
- Picker list for Semester
- Eligibility requirements displayed
- Ability for Graduate Advisor to electronically approve
- Milestone bar available for tracking
- Registration notified of form electronically
- Ability for Registration Staff to assign CRN
- Copenhaven Administration and Department Administrators can view active and inactive tasks and actions
- Copenhaven Administration can view process metric reports

## Course Substitution

Overview: Allows students to electronically submit course substitution requests for approval.

### Version 1

#### Release Date 10.12.16

- Pre-populated with student basic information
  - Name
  - U number
  - Degree
  - Academic Department
  - Concentration
  - Email
  - Reduced Rate Attribute
  - Graduate Advisor
- Manual entry to for student to enter Substitute Course
  - Prefix
  - Course number
  - Course title
  - Course credit hours
- Identify if USF course
  - if no, ability to upload syllabus
- Picker list of COPH Course Substituted
  - Automatic population of section and credit hours
    - Validation – credit hours must be equal/greater than Course Substituted
- Text box for justification
- Ability for Graduate Advisor, Course Instructor and Associate Dean to electronically approve Independent Study
- Milestone bar available for tracking
- Student notified of approved Course Substitution
- Course Substitution populates on the POS

### Version 1.1

#### Release Date 2.13.18

- Graduate advisors can now see Completed Course Substitution Report

## Reporting

Overview: Ad-hoc reports based on needed data.

### Version 1

#### Release Date 9.14.16

- Create Student Information Report – Active
  - Viewable by department administrators, academic affairs, and COPH Leadership
- In Progress Report – tracks processes that are outstanding

### Version 2

#### Release Date 1.06.17

- Grant access to Program Staff and Registration Staff of In Progress Task Report

## **Advising Notes**

Overview: Allows faculty and appropriate staff to document notes on the student record.

### **Version 1**

#### **Release Date 1.06.17**

- Graduate Advisor, Faculty Mentor, Program Staff, Registration Staff, Experiential Learning have ability to write “student facing” or “internal” advising notes on a selected student
- Students have the ability to view “student facing” notes

## **Change of Concentration**

Overview: Allows students to electronically submit change of concentration requests for approval.

### **Version 1**

#### **Release Date 02.06.17**

- Pre-populated with student basic information
  - Name
  - U number
  - Email
  - Faculty Mentor
  - Degree
  - Academic Department
  - Concentration
  - GPA
  - Probation Status
- Picker list of Concentrations
- New department prepopulates based on concentration selection
- Text box for justification
- Ability for Graduate Advisor, Department Chair and Associate Dean to electronically approve
- Notification to Registration Staff
- Milestone bar available for tracking
- Student notified of approved Course Substitution

### **Version 1.1**

#### **Release Date 8.23.17**

- Change of Concentration Requests for DrPH students enabled

### **Version 1.2**

#### **Release Date 2.13.18**

- Nutrition and Dietetics added to Change of Concentration list

## **Pcard**

Overview: Allows faculty and staff to electronically submit receipts for Pcard purchases and reconciliation.

### **Version 1**

**Release Date 08.23.17**

- Form available to enter PCARD expense information for reconciliation
  - Chartfield(s) entry available
- Accountable Officers are able to review submitted PCARD expense information
- Diction updated for mandatory Membership fee purpose
- Description for the Upload Receipt action updated
- Upload receipt integrated with Travel
- Report to Track PCard Expense Submissions available
- Report to Display In-Process PCard Expense Submissions available
- Travel information viewable during PCard Expense Reconciliation Process
- Approval grid viewable throughout PCard Expense Reconciliation Process
- Business Purposes limited to Travel-related purposes if the PCard Expense is Travel-related
- Chartfields require users to enter a min. of 4 characters

### **Version 1.1**

**Release Date 11.14.17**

- Added cancel feature
- PCard Expense Submission Report excel contains: TR#, Chartfields, Other-text
- Ability to manually enter Chartfield information
- Project field in Chartfield grids renamed to Project (Research Only)

### **Version 1.2**

**Release Date 12.12.17**

- Search by Employee ID added to Upload Expense Receipt action
- Ability to upload receipts for non-employees
- Ability to generate PCard PDFs
- Ability for PCard Reconciler to add chartfield information to PCard Expenses
- Ability to access tasks via the PCard Expense Task Report
- PCard Expense Submissions Dashboard created

### **Version 1.3**

**Release Date 2.27.18**



- PCard Task Report now displays active Expense Submissions by Initiator

## **Curriculum Mapping**

Overview: A tool for accreditation purposes to map objectives, competencies, and assessment methods to COPH courses.

### **Version 1**

**Release Date 10.4.17**

- CEPH competencies uploaded into Archivum database
- Curriculum Specialist /Support can populate Course Objectives, Assessment Methods, and Competencies
- Curriculum Mapping Approval Process complete
- CEPH Report is functional
- Curriculum Mapping Process Report is functional
- Accreditation Reports Dashboard

### **Version 1.1**

**Release Date 12.12.18**

- Task title updated for returned Curriculum Specialist tasks

### **Version 1.2**

**Release Date 1.31.18**

- Created Courses Not Initiated & Completed Report

### **Version 1.3**

**Release Date 2.13.18**

- Ability for CM Specialist to reassign tasks via Task Report
- Ability to edit course after final CM process approval

### **Version 1.4**

**Release Date 2.27.18**

- CEPH Report now displays Unmapped Competencies
- CM Review Process now displays Instructor or Record

### **Version 1.5**

**Release Date 3.13.18**

- CM specialist can now Indicate Change in Course ID

- Unmatched Courses for Roll Over Report complete
- Store procedures created for Course Roll Over process
- Course Roll Over processes created
- Course Record now displays Historical Course Information

## **Version 1.6**

### **Release Date 4.3.18**

- CM Specialist can schedule Roll Over
- AY filter added to Course Record
- CM Support can Edit Completed Courses
- 5-day reminders created for Instructor of Record Review stage
- Course Record now displays Terms Active