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 COPH 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 COPH 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
- COPH 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
- COPH Leadership can view Process Metrics
- COPH 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
- COPH Leadership can view Process Metrics
- COPH 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
- COPH Administration can view active and inactive tasks and actions
- COPH 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
- COPH Administration and Department Administrators can view active and inactive tasks and actions
- COPH 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
  o 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
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