Contents

Introduction .................................................................................................................................................................... 3
Getting Started ............................................................................................................................................................... 4
Daily Digest .................................................................................................................................................................... 5
Discipline Advisor Homepage ...................................................................................................................................... 6
Reviewing a Subject ........................................................................................................................................................ 7
Subjects Details View ................................................................................................................................................... 7
Credit Load Summary View ......................................................................................................................................... 9
Host Institution Subject Details View ......................................................................................................................... 10
Event Log View ....................................................................................................................................................... 10
University of Melbourne Credit Request Section ......................................................................................................... 11
Subject Review Section ............................................................................................................................................... 11
Supporting Comments ............................................................................................................................................... 14
Subject Auto-recommendation ..................................................................................................................................15
Auto-approval Rules ................................................................................................................................................15
Auto-recommendation Sample Scenarios .................................................................................................................. 16
Discipline Advisors Reports ......................................................................................................................................... 17
Subject Decision Report .......................................................................................................................................... 17
All Subjects Review Status ....................................................................................................................................... 17
Further Information ...................................................................................................................................................... 18
Introduction

Background

The University of Melbourne strongly encourages students to undertake a portion of their UoM studies overseas through its global network of exchange partners and through the many study abroad, research and practical experience partners throughout the world. By 2020, the University aspires to enable 25% of undergraduate students to have a learning abroad experience on graduation as per the Growing Esteem strategy and it is expected that the University's 2030 strategy will continue to support increased student mobility. To support this, Global Learning seeks to increase opportunities and reduce the internal complexities and inefficiencies impacting the student journey.

Rationale

Study plan approval is integral to the overall process for students applying for exchange and other overseas studies (including short-term summer and winter programs) as the study plan documents the credit which a student will receive towards their UoM degree on successful completion of their overseas studies.

An estimated 8,000 subject approvals are processed each year through more than 120 discipline advisors. The number of requests for credit approvals is increasing rapidly as awareness of overseas study opportunities grows. The new Study planner will move the full process onto an online system to manage the workflow, reduce duplication and create a user-driven system for students.

Functionality

The Study Planner utilises APEX functionality to move this process onto a single platform for students, academic and professional staff. The full administration of the study plan approval process is managed by the Study Planner, including:

- Subject assessment requests by students
- Subject assessment by discipline advisors
- Credit transfer assessment by Stop 1
- Repository of credit approvals providing transparency and reducing re-assessment by discipline advisors

The resulting improvements to the existing business process include:

- Enhanced student self-management
- Processing efficiencies for discipline advisors and Stop 1 staff
- Credit precedence and transparency across the University
- Credit transfer standards that will align with work in the area of advanced standing.

Davina Potts (davina.potts@unimelb.edu.au)
Associate Director - Student Success
Getting Started

1. You can access the Study Planner system in two ways:
   a. the emails sent by the system alerting you to waiting subjects for assessment will contain links that will take you to the login page; or
   b. open a web browser and navigate to the Overseas Study Planner via the following URL:

2. Login using your UoM username and password.
3. Your homepage will be displayed.
Daily Digest

These are emails sent by the Study Planner system which will provide you with a summary list of all the subjects waiting for you to assess. Some things to note:

- Each of the subjects on the list will also indicate the number of days for which the students have been waiting for a response.
- If you have subjects awaiting assessment, these will continue to be listed on the daily digest email until you have submitted your assessment for each of the subjects, that is the count of waiting subjects become zero (0).
- Digest are sent once a day at approximately 8am, 7 days a week. This is an automated email notification.
- At any time, you can access the list of subjects for assessment by searching the 'Approver' column for your email, and for 'subject status' enter 'submitted for review'

LIST OF SUBJECTS
Provides a summary list of the subjects you need to review and the number of days for which it has been awaiting a decision.

The 'Information required' status is considered a temporary status and, until the final decision has been made on the subject, it will be listed as an outstanding task meaning you will continue to have it appear on your daily digest, until the decision is completed.

NOTE

This link will allow you to access the system once you have logged-in using your UoM username and password.

VIEW YOUR OUTSTANDING SUBJECT APPROVALS

Dear Discipline Advisor,

Subjects to be studied overseas on exchange or study abroad have been submitted for your review. The link below will take you to the view of all subjects awaiting your consideration. Subjects submitted for review today will be available immediately but you will be notified daily of any outstanding subjects requiring review until you make your assessment.

View your outstanding subject approvals

Subjects Requiring Approval | Staff Comments.write | Student Visible Comments | Days At Status
--- | --- | --- | ---
1111 | one | | 9
TH2102 | Culture | 2
AM1213 | Studio project, Advanced Level, Autumn, part B | 2
ddd | odd | 2
wweve | wveve | 2
abc123 | abc123 | 2
AM2113 | Studio project, Advanced Level, Autumn, part B | 2
b3i05 | Infection and immunity | 2
T1966 | Testing | 2
X12 | Subjective Subject | 2
STU | Objective Subject | 2
test | test | 2
ABC | ABC | 2

Please contact Melbourne Global Mobility (ext. 47452 or gdmobility@unimelb.edu.au) if you have any questions or concerns about this process.

Kind regards,

Melbourne Global Mobility
### Discipline Advisor Homepage

**SUBJECT ID BUTTON**
Clicking on these buttons will display the associated subject details page.

**LIST OF ALL THE SUBJECTS AWAITING YOUR REPORTS**
Clicking on this button will take you to the reports section.

**STUDY PLANNER BANNER**
Clicking on the banner will take you back to this homepage.

**LOGOUT**

**PAGINATION**
Clicking on this arrow will display the next page of subjects (if any).

---

**NOTE**
If there are no subjects awaiting approval from you, then this page will be blank.
Reviewing a Subject

To review a particular subject from your list, click on the 'Subject Details' button to start the process:

**STUDENT DETAILS**
Click on ➤ to display
- Personal Details
- Course Details
- Enrolled Subject Details
- Other Subject Details
(Refer to Next Page)

**Credit Load Summary**
Click on ➤ to display a summary of credit load applicable to the study plan that this subject is associated with.

**UoM Equivalency Fields**
These fields are editable by you. If you do not approve of the student’s request, please override the student entry with ‘null’ and enter an explanation in the Comments for Students.

**SUBJECT REVIEW**
This is the section to enter your review decision.

**SEND TO DISCIPLINE AREA**
Select the new discipline and press the button to submit.

**SEND TO UoM Email**
If you wish to delegate the task to a colleague, enter their email & submit.

**BACK TO PLAN**
This will display the plan with which this subject is associated.

**SAVE SUBJECT**
This will saves/updates any subject information.

**SUBMIT ASSESSMENT**
This will submit the assessment decision.
Subjects Details View

Mr Philippe Aslanis, Study Plan for Royal Institute of Technology (KTH) - Studio project, Advanced Level, Autumn, part B

**Personal Details**
- Student ID: 586160
- Given Names: Philippe
- Family Name: Aslanis
- Email: tla6563@gmail.com

**Course Details**
- **B. Sci**: Bachelor of Science
  - Commencement Date: 2012-02-27
  - Status: Passed
- **MD**: Doctor of Physiotherapy
  - Commencement Date: 2010-05-03
- **BA**: Bachelor of Science (Biological Sciences)
  - Commencement Date: 2010-05-03
- **M.D**: Master of Public Health
  - Commencement Date: 2010-05-03
- **MD-DPM**: Master of Science (Dentistry)
  - Commencement Date: 2010-05-03
- **MD-CER**: Master of Science (Endocrinology)
  - Commencement Date: 2010-05-03
- **MD**: Master of Biomedical Science
- **ADME**: Master of Environment

**Enrolled Subjects**
- **POPH60243**: 2146W Epidemiology 2
  - Enrolled Parkville
  - 2016-08-25
- **POPH60241**: 2146W Qualitative Research in Public Health
  - Enrolled Parkville
  - 2016-08-25
- **POPH60218**: 2146W Public Health Leadership and Management
  - Enrolled Parkville
  - 2016-08-25
- **POPH60144**: 2146W Linear and Logistic Regression
  - Enrolled Parkville
  - 2016-08-25

**Other Subjects**
- **POPH60212**: 2146W Infectious Diseases
  - Passed Parkville
  - 2016-08-25
- **POPH60213**: 2146W Biostatistics
  - Passed Parkville
  - 2016-08-25
- **POPH60214**: 2146W Epidemiology 1
  - Passed Parkville
  - 2016-08-25
- **POPH60217**: 2146W Foundations of Public Health
  - Passed Parkville
  - 2016-08-25
- **MIN70014**: B.SG Medical Microbiology: Virology
  - Passed Parkville
  - 2016-08-25
- **PSYC10034**: B.SG Mgmt, Behav and Behaviour
  - Passed Parkville
  - 2016-08-25
- **BIOJ20001**: B.SG Reproductive Physiology
  - Passed Parkville
  - 2016-08-25
- **MIN70014**: B.SG Medical Microbiology: Virology
  - Passed Parkville
  - 2016-08-25
- **GEOE30003**: B.SG Human and Medical Geometrics
  - Passed Parkville
  - 2016-08-25
- **EVSC20003**: B.SG Forestry in a Global Context
  - Passed Parkville
  - 2016-08-25
- **MIN70010**: B.SG Techniques in Microbiology
  - Passed Parkville
  - 2016-08-25
- **MIN70001**: B.SG Evolutionary Genetics and Genomics
  - Passed Parkville
  - 2016-08-25
- **MIN70002**: B.SG Principles of Immunology
  - Passed Parkville
  - 2016-08-25
- **BIOP10011**: B.SG Medical Microbiology
  - Passed Parkville
  - 2016-08-25
- **BIOP20004**: B.SG Planta s of Viruses
  - Passed Parkville
  - 2016-08-25

**NOTE**
All this information is extracted every night from Student One.

**COURSE DETAILS**
These are all the courses with which the student has been connected in Student One. In this case the student has only begun the B Sci and MPH as indicated by the commencement dates, and has completed the B Sci as its status is listed as “Passed”.

**ENROLLED SUBJECTS**
These are the subjects in which the student is currently enrolled.

**OTHER SUBJECTS**
These are all the subjects, other than the currently enrolled ones, which the student has attempted at some point at Melbourne. The status indicates that most have been passed and some failed.
Credit Load Summary View

This section will only appear for students applying for an exchange. The load equivalency is determined by Global Learning and programmed into this system. The students select the one that they think best fits them.

<table>
<thead>
<tr>
<th>PERIOD</th>
<th>DISCIPLINES</th>
<th>Min Credit</th>
<th>STUDY LEVEL</th>
<th>Max Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Semester</td>
<td>ALL SUBJECT DISCIPLINES</td>
<td>22.5 ECTS</td>
<td>ALL STUDY LEVELS</td>
<td>30 ECTS</td>
</tr>
<tr>
<td></td>
<td></td>
<td>equates to 37.5 UoM points</td>
<td>equates to 50 UoM points</td>
<td></td>
</tr>
</tbody>
</table>

**Total Credit Value Summary**

<table>
<thead>
<tr>
<th>Credit Status</th>
<th>Subjects</th>
<th>Total Credit</th>
<th>Committed Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not recommended for credit</td>
<td>1</td>
<td>20</td>
<td>0</td>
</tr>
<tr>
<td>Recommended for credit</td>
<td>1</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Submitted for review</td>
<td>2</td>
<td>24</td>
<td>0</td>
</tr>
</tbody>
</table>

**CREDIT LOAD**

The credit load applicable to the plan, with which the subject under is associated.
Host Institution Subject Details View

In this section you will be able to edit any of this information entered by the student to correct, for example, data input errors.

As the system will use the information input here in the future to approve subjects automatically (the so-called auto-approve facility, see page 16 for more information) where students are requesting the same subject for the same type of credit, incorrect data will cause that matching process to fail. If you notice a typographical error here, please correct it.

Event Log View

This is not viewable by students.
University of Melbourne Credit Request Section

You will be able to edit the ‘Type of credit requested for this subject?’ by the student from any of the available choices – Core, Elective or Breadth. If the student has requested, for example, “Core Credit” and you do not think the subject appropriate for that but instead would only be suitable for “Elective Credit”, you can nominate that here.

The field ‘Level of credit requested for this subject’ though not mandatory for the student to enter, it is a compulsory field for the discipline advisor.

Students seeking equivalent subject are required to enter their request here. If you assess this differently to the student’s request (ie. not equivalent, equivalent to another) please override the student’s entries > change the Y/N selection, enter ‘null’ and enter the reasoning in the Comments for students > select add/update subject.

Most subjects done overseas will not need to have an equivalent here, the exception will mainly be when students are requesting core credit approval.

Subject Review Section

You will be able to perform the following actions within this section:

1. Redirecting the Subject to the Another Discipline Area
   If the student has submitted the approval request to your discipline area incorrectly, you can select the area to which it should go from the ‘Discipline area’ selection list and simply click on the ‘Send to discipline area’ button. Clicking on the button will:
• redirect the task to the discipline advisor you nominated where it will be included in the daily digest for that person; and
• take you back to your homepage where this subject will no longer be listed.

2. Reallocating the subject
You can choose to delegate a subject review task to another person perhaps for a second opinion or because roles have recently changed. To do this, enter a valid UoM email address and click on the ‘Send to UoM email address’ button. Clicking on the button will:
• Redirect the task to the person whose email address you entered where it will be included in the daily digest for that person; and
• take you back to your homepage where this subject will no longer be listed.

3. Save Subject
You will have the ability to edit/update some subject details and save the changes, before you submit your assessment. Clicking on the button will:
• Save and Update the subject details; and
• Take you back to your homepage.
4. **Submit Assessment**

You will be able to provide one of the following assessment decisions to any of the subjects under review.

<table>
<thead>
<tr>
<th>Subject Review Status</th>
<th>Review Impact</th>
<th>Impact on Auto Approval Database</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Comments for Students Required?</td>
<td>Student can Enrol and Commit?</td>
</tr>
<tr>
<td>Recommended for credit</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Not recommended for credit</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Information required *</td>
<td>Yes</td>
<td>N/A</td>
</tr>
<tr>
<td>Recommended for credit, but not for this student</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Recommended for credit but only for this student</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

* Note: The Information required status is considered to be a temporary status and until the final decision has been made on the subject, it is still treated as an outstanding task which means it will continue to be listed on the daily digest, until an assessment has been completed.

Clicking on the button will result in the following outcomes:
- the subject assessment will be submitted and the status of the subject will change;
- you will be returned to your homepage and
- a notification will be sent to the student telling her/him that a change has occurred.
Comments

As a part of the review process you will be able to add in supporting comments:

- **Staff Comment Log** – This must be used for internal communications only. Any content entered here is **viewable by staff only**.
- **Comments for students** – You must enter supporting comments for assessment decision except ‘Recommended for credit’. These comments are **viewable both by staff and students**.
Subject Auto-recommendation

As decisions are made about subjects the system collects that information for future use providing it to students with forthcoming applications, the so-called known subject list, and automatically subjects under the same conditions. In the latter case, if a subject request has the same criteria as one previously recommended for credit, the subject will skip the Discipline Advisor review step and be automatically recommended for credit.

Auto-approval Rules

A subject submitted for assessment will be automatically recommended for credit if the following fields match with a previously recommended subject:

a. subject code at host institution
b. credit value/points at host institution
c. type of credit requested for this subject (core, elective or breadth)
d. discipline area

In addition, the period for which a recommendation lasts currently has a default time of five years. This period can be varied at the request of the approving advisor. The auto-recommendation is independent of the type of program, i.e. once a subject is recommended for credit it will be considered for both Exchange and Overseas (study abroad) plans. All subjects recommended or not recommended will be used to build a list of subjects called the ‘Known Subject List’ for the host institutions, which students can add to their plans, if they wish.
Auto-recommendation Sample Scenarios

Kim is in the process of applying for an exchange to Lund University. She submitted her study plan for assessment on 12/7/2016. One of the subjects submitted was ARTS423 - ‘Sustainability in the Built Environment’ worth 10 credits. Kim requested ‘Core’ credit for this subject. The subject was reviewed and recommended for credit on 14/7/2016 by Prof. Jacob Ferguson the advisor for ‘Architecture, Building and Planning – Architecture’, with 10 credits and credit type, Core. During the process, Prof. Ferguson, entered UoM equivalent subject code, subject name, the UoM credit points and other details. With the default period of five years, the subject will continue to be recommended for credit until 15/7/2021.

In the following years, several study plan applications were submitted with the same subject ‘ARST423’ but with a different combination of information:

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Discipline Area</th>
<th>Subject Code</th>
<th>Subject Title</th>
<th>Credit Value</th>
<th>Credit Type</th>
<th>System Audits</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student submits ARST423 on 6/3/2018, but enters the subject title incorrectly</td>
<td>Architecture, Building and Planning – Architecture</td>
<td>ARST423</td>
<td>The Sustainability in the Built Environment</td>
<td>10</td>
<td>Core</td>
<td>6/3/2018</td>
<td>Although the subject title was incorrectly spelt, the subject code and credit value match. The auto-recommendation’s ‘valid until date’ was set with the first recommendation for this subject, in this case 15/7/2021.</td>
</tr>
<tr>
<td>Student submits Sustainability in the Built Environment on 7/4/2019, but forgets to enter the subject code</td>
<td>Architecture, Building and Planning – Architecture</td>
<td>?</td>
<td>Sustainability in the Built Environment</td>
<td>10</td>
<td>Core</td>
<td>X</td>
<td>Although every other field matched, with the subject code was missing, the Subject failed to match the criteria and was not auto-recommendation. This will have to go through a manual review process.</td>
</tr>
<tr>
<td>Student selects the ARST423 from the Known Subject List sending it to a different Discipline Area 5/4/2020</td>
<td>Architecture, Building and Planning – Construction Management</td>
<td>ARST423</td>
<td>Sustainability in the Built Environment</td>
<td>10</td>
<td>Core</td>
<td>X</td>
<td>Though this subject has been recommended by ABP – Architecture, sending the subject to a different Discipline Area means it will not be auto-recommended. This will have to go through a manual review process.</td>
</tr>
<tr>
<td>Student selects ARST423 from the Known Subject List but updates the Credit Type and Credit Value</td>
<td>Architecture, Building and Planning – Architecture</td>
<td>ARST423</td>
<td>Sustainability in the Built Environment</td>
<td>15</td>
<td>Breadth</td>
<td>5/4/2019</td>
<td>It will not be auto-recommended as the credit type and credit value are different. This will have to go through a manual review process.</td>
</tr>
<tr>
<td>Student submits ARST423 on 6/8/2021</td>
<td>Architecture, Building and Planning – Architecture</td>
<td>ARST423</td>
<td>Sustainability in the Built Environment</td>
<td>10</td>
<td>Core</td>
<td>X</td>
<td>It will not be auto-approved as it is past the validity date This will have to go through a manual review process.</td>
</tr>
</tbody>
</table>
### Discipline Advisors Reports

#### Subject Decision Report
This is the record of the subjects recommended for credit. The Discipline Advisors *can only view* the history. They will *not* be able to edit the subjects.

#### All Subjects Report Status

<table>
<thead>
<tr>
<th>Id</th>
<th>Student Id</th>
<th>Host Institution</th>
<th>Subject Code</th>
<th>Subject Title</th>
<th>Credit Units</th>
<th>Days At Status</th>
<th>Approver</th>
<th>Host Year Level</th>
<th>Host Period</th>
<th>Ums Credit Type</th>
<th>Ums Equivalent</th>
<th>Ums Year</th>
<th>Dept Approving</th>
<th>Student Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>K43</td>
<td>123456789</td>
<td>City University</td>
<td>123456</td>
<td>Subject A</td>
<td>3</td>
<td>Submitted for review</td>
<td></td>
<td>2023-01-01</td>
<td>30</td>
<td>ELECTIVE</td>
<td>0</td>
<td>2023</td>
<td>Health Sciences</td>
<td>John Doe</td>
</tr>
<tr>
<td>K47</td>
<td>987654321</td>
<td>State University</td>
<td>234567</td>
<td>Subject B</td>
<td>5</td>
<td>Submitted for review</td>
<td></td>
<td>2022-11-11</td>
<td>40</td>
<td>ELECTIVE</td>
<td>0</td>
<td>2023</td>
<td>Education</td>
<td>Jane Smith</td>
</tr>
</tbody>
</table>

**SUBJECT ID BUTTON**
Click on these buttons will display the associated subject details page.
Further Information

If you have any questions, concerns or experience any problems with the system, please contact:

Global Learning team
#47452
global-mobility@unimelb.edu.au

Benita Ho - Manager, Global Learning
#59523
Benita.ho@unimelb.edu.au

When reporting an issue, please take a screen shot of the error and note both the student ID and plan ID the error occurred on.