

Penn Graduate Forms

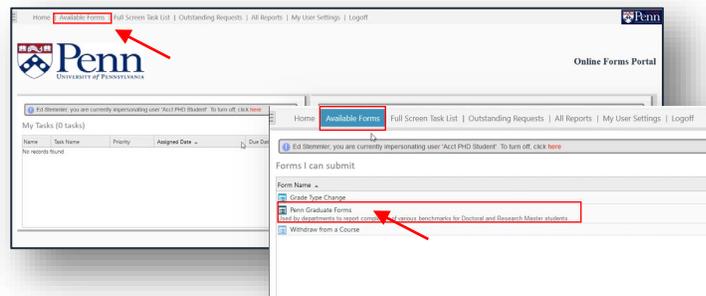
Frequently Asked Questions



ACCESS & SECURITY

Q: How do I access Penn Graduate Forms?

A: Simply login using your Penn credentials at <https://upenn.bpligix.net>. From the Home screen, click on Available Forms and then select Penn Graduate Forms on the next screen.



Q: How do I get access to Penn Graduate Forms?

A: To request access for a new user to Penn Graduate Forms, please send an email with the name, PennID, school and role of the person needing access to grad-degree@provost.upenn.edu. Student access to Penn Graduate Forms is determined by the School/Division. Schools that want to provide student access should email grad-degree@provost.upenn.edu. Students will only have access to submit or view the status of submitted forms.

Q: What forms are available and how do I know which form to use?

A: There are multiple forms available depending on your School/Division or Role. Click on Available Forms to see the "Forms I Can Submit." Below each form name is a brief description of the use of each form. If there is a form you believe you should have access to or if you are unsure of which form to use, please reach out to your School/Division Administrator or send an email to grad-degree@provost.upenn.edu.

ROLES

Q: How do I know what my role is in a form?

A: There are four main roles for staff and faculty in Penn Graduate Forms:

Division Admin

- Typically the Registrar or PhD Coordinator
- Can have multiple per school/division
- Can see, submit, and edit forms for their programs and degrees
- Does not approve forms
- Does not receive email digests

Form Approver

(includes committee members)

- Can be anyone who is required to sign off on the form
- Can have many per school/division
- Approves or rejects forms
- Cannot view/edit forms that are not assigned to them
- Receives email digests

Data Entry

(optional role)

- Can have many per school/division
- Enters form information into SRS/Banner
- Cannot approve forms
- If required for school yet unassigned, it defaults to the Division Admin
- Does not receive emails or any digests

Coordinator

- Typically administrative staff
- Can have many per school/division
- Can enter and edit forms
- Cannot approve forms
- Does not receive emails or any digests

Refer to the routing slip at the bottom of any existing form to see the available roles and the people selected for that role. Committee roles are selected by the submitter (student or administrator) and receive an email notification when they are required to take action.

NOTE: It is possible for a single user to be assigned to more than one role.

Q: What are the roles for Dissertation Committee Members?

A: Committee members are selected and entered directly by the submitter (student or administrator) and receive emails for:

- **Committee Formation Form:** to confirm they will serve on a Dissertation Committee
 - Email goes out as soon as it is submitted to confirm participation on committee
- **Acceptance of Dissertation Form:** to vote on dissertation
 - System waits to send the email until 2 days before defense (example: if you enter the form on August 1 for a August 30 defense, the system will send the email on August 28)

DELEGATING & SHARING

Q: How do I delegate my tasks to someone else?

A: Delegation means that you are no longer completing any tasks that are assigned to you and the person selected has full control and responsibility to complete all tasks on your behalf. To set up delegation, click on User Settings from the Home screen. Under the Delegation section, select the user name and then click Delegate User.

Q: What is the difference between delegating and sharing access?

A: **Delegation** turns over full control of approving or rejecting requests assigned to you to the person you delegated to. **Sharing** access means that anyone you share with will have the same access as you to approve or reject forms. The workflow will move to the next step as long as the person in the delegate or shared role acts on the request. To set up Sharing, click on User Settings from the Home screen. Under the Sharing section, select the user name(s) and then click Share User.

EMAILS

Q: Who receives email reminders from the system?

A: Email digests are sent based on your role in the system. Please check your spam folder if you are not receiving emails and mark emails from Penn Graduate Forms as “not spam.”

- Form approvers receive twice weekly email digests (Monday/Thursday) with reminders about their pending tasks.
- Committee members receive individual emails when there is a pending action (i.e., to approve their role on the committee or to approve a dissertation). Reminder emails are sent on a weekly basis.
- Division Admin, Coordinator, or Data Entry roles currently do not receive email notifications and can access the list of their pending tasks on the Homepage.
- Anyone who submits a form (whether they are students, coordinators, or Division Admins) receives an email confirming the form has been processed once it completes the workflow.

Q: How do I unsubscribe from Penn Graduate Forms emails?

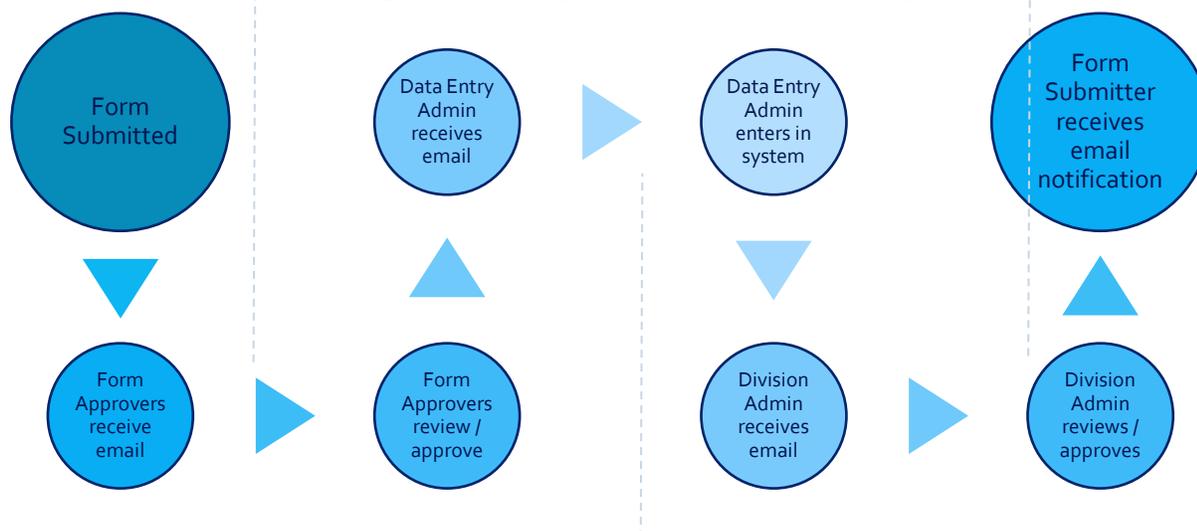
A: You can mute all emails from the system by going to User Settings and clicking on the Disable All Your Emails option in the bottom left. Please note this applies to ALL BPLogix emails. Users who chose to mute emails should proactively check the system to ensure there are no actions awaiting their response.



PROCESS AND WORKFLOW

Q: What does the general workflow for forms look like?

A: Workflows for each form may vary slightly between different Schools/Divisions. The general workflow follows these steps:



Q: What does an approver see when they go to approve?

A: An Approver will see the form that has been submitted, including the routing slip and comments, and will be asked to record their response. Approvers may be asked to upload additional information (for example, External Committee Members will be asked to upload their CV).

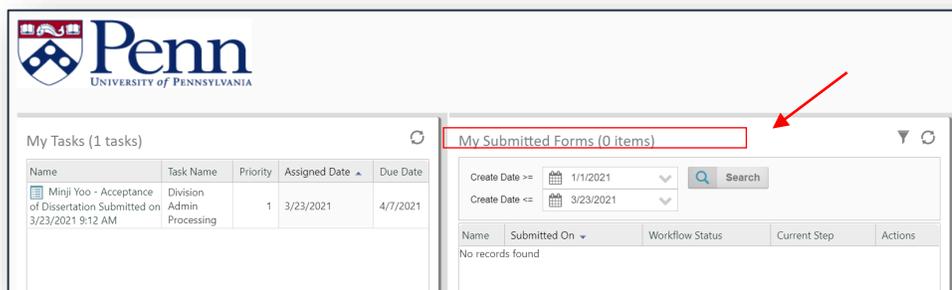
Q: What does the submission process look like for a submitter?

A: Everyone logs into the same link: <https://upenn.bplogix.net>, but user views may vary depending on school and role. Submitters (including students) will be able to see what forms they have access to by clicking on Available Forms and then “Forms I Can Submit.” After selecting the appropriate form, the submitter clicks the dropdown menu to select the student (if not logged in as a student), graduate group (if not logged in as a student), milestone, and then enters the requested information on the form and clicks “submit”.

OTHER FAQ'S

Q: How do I see the status of submitted forms?

A: You can see the status of any forms you have submitted by looking at the “My Submitted Forms” area on the homepage:



Division Admins can search for students within their own Division by selecting “Penn Graduate Forms – Submitted” from Available Forms. Currently, this search only supports searching for individual students or all students within a major.

Q: What do I do if I submitted the wrong form or entered incorrect information on a form?

A: Currently Penn Graduate Forms does not support the ability for users to edit or recall forms. If you have submitted an incorrect form or need to retract a form, please email grad-degree@provost.upenn.edu for assistance.

Q: What do I do if I get an error message or need technical assistance?

A: Please email grad-degree@provost.upenn.edu with any technical questions. Questions about which forms to use or the status of current forms should be directed to your School’s Division Admin.