



Approving a Doctoral Workflow Request

User Guide

A user guide for graduate program coordinators and managers for approving or denying a request submitted through the doctoral workflow.



User Guide – Approving a Doctoral Workflow Request

The Kualo workflow application has been implemented for graduate students to request to appoint or modify their Ph.D. committee, schedule or modify their qualifying exam, schedule or modify their dissertation defense, request to extend the deadline to enter candidacy, and/or request to extend candidacy. Graduate program coordinators and managers will utilize the Kualo workflow application to review doctoral workflow requests for their students. Students and administrators should refer to the Graduate School [catalog](#) for academic regulations.


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Reviewing the Doctoral Workflow Request

1. Once a request for doctoral workflow has been directed to you, you will receive two emails: a carbon copy of the notification sent to the student stating that their request has been submitted, and an approval request. Click **Begin Review** on the approval request to access the form.

Subject: Approval: Doctoral Actions: [REDACTED]



Hello [REDACTED],

A Doctoral Actions form has been filed for the **Biomedical Engineering** program.

[REDACTED] has requested the following:

Extend deadline to enter candidacy (Qualifying Exam Extension)

Form Name: DOCTORAL ACTIONS

Step Name: PROGRAM ADMINISTRATOR APPROVAL

Your Action: APPROVAL

Begin Review

2. Information about the student appears in the Student Information section.

EMPLID *	VUnetID	First Name	Last Name
000: [REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Email Address

[REDACTED]@vanderbilt.edu

Select your academic program: ?

Biomedical Engineering - PHD

Program Permissions *

Please type the name of the academic program to provide document access to program administrators and Directors of Graduate Studies. The name should be typed exactly as shown in the adjacent field and must be listed in addition to the student-selected academic program for access to be granted.

Biomedical Engineering - PHD

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- The Action(s) Requested section reflects the student’s choice(s) of doctoral actions (appoint or modify their Ph.D. committee, schedule or modify their qualifying exam, schedule or modify their dissertation defense, request to extend the deadline to enter candidacy, and/or request to extend candidacy). Please refer to the Graduate School catalog for detailed information about requirements.

Action(s) Requested
Refer to the [Graduate Catalog](#) for detailed information about requirements.

Please select the applicable action(s): *

Appoint or modify the Ph.D. Committee

Appoint or Modify the Ph.D. Committee

- The selected action (Create or Modify) is reflected in the Action section.

Action

Committee action (select one): *

Create a new committee (Any and all existing committee members will be replaced)

- Committee members are listed, and any additional documentation required for non-Graduate Faculty is provided in the File Upload section.

New Committee: Members of the Committee

Name	VU Department/Program (or Non-VU Institution)	Committee Role	Email (Non-VU Only)

File Upload

Upload curriculum vitae (if necessary)
No file attached

Upload justification memo (if necessary)
No file attached

Schedule or Modify the Qualifying Exam

1. The selected action (Schedule or Modify) is reflected in the Qualifying Exam Action section. **The Graduate School must be notified at least two weeks in advance.**

Qualifying Exam Action: *
Modify an existing qualifying exam

Date and Location of Qualifying Exam		
<i>The Graduate School must be notified at least two weeks in advance.</i>		
Date of Qualifying Exam * Submissions must be at least 2 weeks out.	Qualifying Exam Time *	Qualifying Exam Location *

Schedule or Modify the Dissertation Defense

1. The selected action (Schedule or Modify) is reflected in the Defense Action section. **The Graduate School must be notified at least two weeks in advance.**

Defense Action * Schedule a new dissertation defense		
Expected Graduation Term		
Date and Location of Dissertation Defense		
Defense Date *	Defense Time *	Defense Location *
Dissertation Title		
The dissertation title must be entered in title case format.		

Extend Deadline for Qualifying Exam

Extend Deadline for Qualifying Exam
Please enter the month, day, and year for the extension of the deadline to complete the Qualifying exam. *
Students should refer to Academic Regulations in the Graduate School Catalog. Catalogs may be found here . Students should check program regulations as individual programs may have additional requirements.
August 3, 2023
Please provide a rationale for this extension request. *

Extend Candidacy

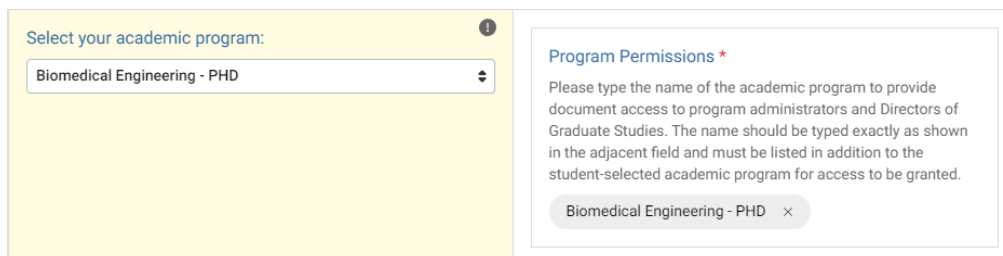
Extend Candidacy
Please enter the month, day, and year for the extension of the deadline to complete dissertation defense requirements for Ph.D. degree conferral.
Students should refer to Academic Regulations in the Graduate School Catalog. Catalogs may be found here . Students should check program regulations as individual programs may have additional requirements.
October 13, 2023
Please provide a rationale for this extension request.

Approval Workflow/Timeline

The graduate program coordinator/manager is the first step in the Doctoral Action workflow. Once the graduate program coordinator/manager approves a request, it routes to the Director of Graduate Studies and then to the Graduate School for final review and approvals. Upon final approval, the request routes to the Office of the University Registrar for processing.

Set Program Permissions

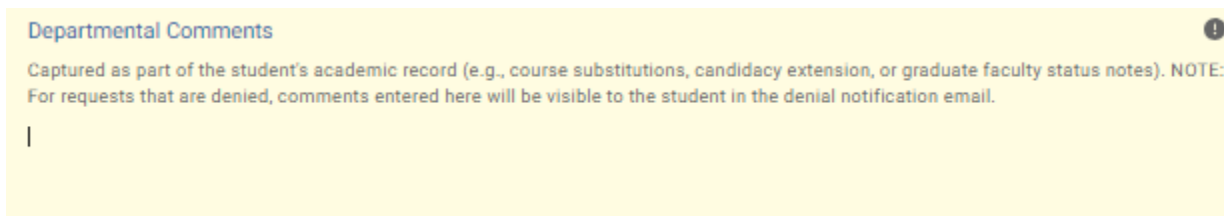
1. In the Program Permissions field, enter the department exactly as it is listed in the adjacent academic program field.



The screenshot shows a form with two main sections. On the left, a yellow box contains the text "Select your academic program:" above a dropdown menu. The dropdown menu is open, showing "Biomedical Engineering - PHD" as the selected option. On the right, a white box contains the text "Program Permissions *" followed by a paragraph of instructions: "Please type the name of the academic program to provide document access to program administrators and Directors of Graduate Studies. The name should be typed exactly as shown in the adjacent field and must be listed in addition to the student-selected academic program for access to be granted." Below this text is a text input field containing "Biomedical Engineering - PHD" with a small 'x' icon to its right.

Approving the Doctoral Workflow Request

1. Leave a comment in the Department Comments box, if desired. Comments will be visible to administrators (DGS, Graduate School, Office of the University Registrar), but not to the student.



The screenshot shows a yellow box with the text "Departmental Comments" at the top left and a small information icon at the top right. Below the title is a paragraph of text: "Captured as part of the student's academic record (e.g., course substitutions, candidacy extension, or graduate faculty status notes). NOTE: For requests that are denied, comments entered here will be visible to the student in the denial notification email." Below this text is a text input field with a vertical cursor (|) at the beginning.

2. Click Approve.



The screenshot shows a horizontal bar with three buttons: "Save", "Approve", and a close button (X). The "Approve" button is highlighted with a red rectangular box.

3. The request will now be routed to the Director of Graduate Studies.

Denying the Doctoral Workflow Request

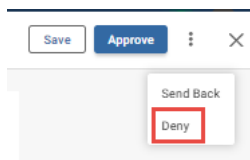
1. Leave a comment in the Department Comments box, if desired. **NOTE:** Any comments in this box, whether left by the Graduate School or the graduate program coordinator/manager, **will be included** in the denial notification email sent to the student.

Departmental Comments ⓘ

Captured as part of the student's academic record (e.g., course substitutions, candidacy extension, or graduate faculty status notes). **NOTE:** For requests that are denied, comments entered here will be visible to the student in the denial notification email.

|

2. Click Deny.

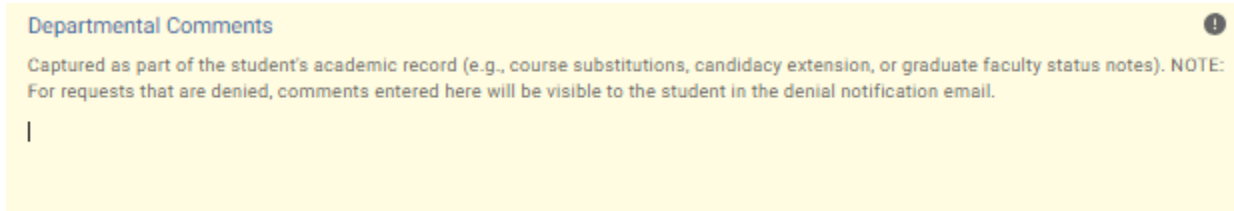


3. The student will be notified via email that the request has been denied.

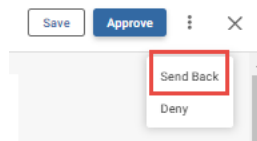
Sending the Doctoral Workflow Request Back to the Student

If, during the course of your review, you notice something that requires the student to change the request, you can send the request back.

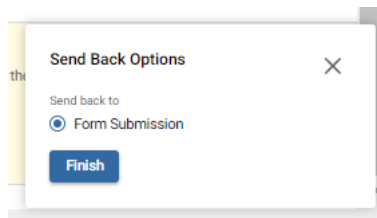
1. Leave a comment in the Department Comments box, if desired. Comments will be visible to administrators (DGS, Graduate School, Office of the University Registrar), but not to the student.



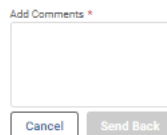
2. Click Send Back.



3. Select Form Submission to return the request to the student.



4. Add comments. These will be included in the notification to the student.



5. Click Send Back. The student will be notified via email that the request has been sent back for additional action.

Accessing Your Work Queue

In addition to clicking on the “Begin Review” button embedded in the notification emails, you can access your work queue at the following web address: <https://vanderbilt.kualibuild.com/>. Click Action List.

Accessing the Documents List

To see a list of doctoral action requests in your department, access the home screen at <https://vanderbilt.kualibuild.com/>. Click the Doctoral Actions tile and you will see a highly configurable listing of all submitted requests. By turning on and off “Columns” and using different filters, you can customize your experience with data elements you may find helpful. (A helpful starting point is here: <https://vanderbilt.kualibuild.com/document-list/64108a7cf4e2d81965298e12>.)

1. To turn columns on and off, click Columns in the top row. A list of available fields will appear. Click on the eyeball icon to add or delete a column from your view.
2. To export data, click Export in the top row. You can select to export either what you see on your screen (Current View), or all available data (All Data).

Please contact the YES Help Line at yes@vanderbilt.edu or 615-343-4306 if you have questions or need additional assistance.