

Administrator Guide

Acceptance of the Memorandum of Understanding (MOU) and Progress and Planned Activity (PPA) forms in the MoU/PPA tile in PeopleSoft

Date created: 20 December 2020

***This document and the information herein is the property of the University of Cape Town and may only be used for training purposes. The reproduction and distribution of the training manual, in whole or in part, is strictly prohibited.*



Contents

Lesson 1: Academic Standing Codes.....	4
Lesson 2: Manage Service Indicators.....	6
Lesson 3: Monitoring MoU and PPA Submissions	10
Lesson 4: Student Log In	13
Lesson 5: Student Viewing the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form.....	14
Lesson 6: Student Accepting the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form	25
Lesson 7: Supervisor Viewing the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form	26
Lesson 7: Supervisor Approving or Declining the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form	32
Lesson 9: HOD Viewing the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form.....	35
Lesson 10: HOD Approving or Declining the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form	39
Lesson 11: Deputy Dean Viewing the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form	41
Lesson 12: Deputy Dean Approving or Declining the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form	45



Section 1: Contextual Information

The Memorandum of Understanding (MoU) or Abridged MoU (where permitted) should be completed by postgraduate students and their supervisor(s) when the student registers for the first time for either their Masters' or Doctoral degrees.

The Progress and Planned Activity (PPA) Report must be completed for each subsequent year as a condition for renewal of registration.

By the time the MoU or the Abridged MoU or the PPA is initiated and/or completed, there is the expectation that there has been adequate engagement between the supervisor(s) and student. The completion of these documents is required to formalise the outcome of the discussion between the supervisor(s) and the student.

These documents and report lay out the expectations of both supervisor and student and is designed to ensure the supervision experience is mutually productive.

Care should be taken in completing these documents in full, as it is a contractual agreement.

The documents will be used in any disputes that may arise during the period a student is registered for a postgraduate degree.

Note This is a dynamic form where different fields will be displayed depending on your selected options. There is no limit on text input. The form does not expire and does not have a time limit.

1.1: Target Audience

This manual targets postgraduate staff that will manage student MoU and PPA forms.

1.2: Specific Outcomes

- Academic Standing Codes
- Term Activation Procedures
- Manage Service Indicators
- Monitoring MoU PPA Submissions
- Student Completing MoU/PPA
- Supervisor Completing MoU/PPA
- Head of Department Completing MoU/PPA
- Deputy Dean Completing MoU/PPA

Memorandum of Understanding between the Postgraduate Student and Supervisor.

First Year of Registration for master's and Doctoral Students

- Memorandum of Understanding (**MoU**) is a contract which includes agreed roles and responsibilities of both candidate and supervisor, to ensure that the supervision experience is as mutually productive as possible.
- Progress and Planned Activity (**PPA**) is a plan for students and supervisors to review progress in the previous year, and agree on plans for the forthcoming year, prior to re-registration. This is also an opportunity to update any of the agreements made when you signed the MOU.

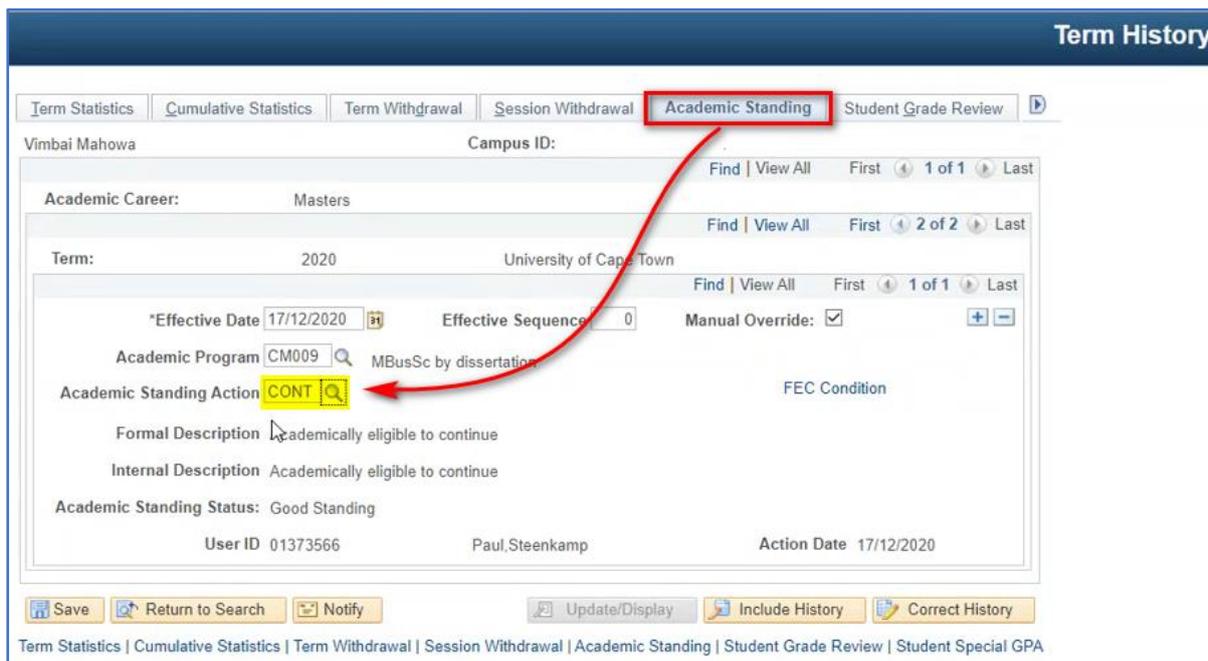
Lesson 1: Academic Standing Codes

Academic standing codes need to be processed for returning students so they may receive their PPA forms.

Academic standings must have a **CONT** status or the Head of Department will be able to sign off instead of the Deputy Dean as well and the student will be able to register.

Navigate to Academic Standing

Records & Enrollment>Student Term Information>Term History



The screenshot displays the 'Term History' interface. At the top, there are several tabs: 'Term Statistics', 'Cumulative Statistics', 'Term Withdrawal', 'Session Withdrawal', 'Academic Standing' (highlighted with a red box), and 'Student Grade Review'. Below the tabs, the user is identified as 'Vimbai Mahowa' with 'Campus ID:'. The 'Academic Career' is 'Masters'. The 'Term' is '2020' at the 'University of Cape Town'. The 'Academic Program' is 'CM009' (MBusSc by dissertation). The 'Academic Standing Action' is 'CONT', which is highlighted with a yellow box and a red arrow pointing to it from the 'Academic Standing' tab. The 'Academic Standing Status' is 'Good Standing'. The 'User ID' is '01373566' and the 'Action Date' is '17/12/2020'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Update/Display', 'Include History', and 'Correct History'.

Matriculate and Term Activate Students

Students must be term activated and matriculated on the system before they can receive their MoU or PPA forms.

Term Activation Procedures

Individual Term Activation – New Students

Students must already have been matriculated in PeopleSoft. **The matriculation date must be before the start of term.**

Navigate to Term Activation

Records & Enrollment>Student Term Information>Term Activate a Student

Activating Individual Returning Students

Use this procedure to term activate individual returning students. Use the **Batch Term Activate** process for most students.

Note You do not need to re-matriculate returning students. Returning students will already have been matriculated in the system in their Career. **You will only matriculate (date before the start of term) a student who is returning to start another Career (degree) and you would treat such students as new applicants.**



Navigate to Term Activation

Records & Enrollment>Student Term Information>Term Activate a Student

Term Activate a Student

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ Search Criteria

ID

Campus ID

National ID

Last Name

First Name

Case Sensitive

[Basic Search](#) [Save Search Criteria](#)



Lesson 2: Manage Service Indicators

A service indicator needs to be added to the student record so that the postgraduate student may receive the required form.

Navigate to: Manage Service Indicators

Campus Community>Service Indicators (Student)> Manage Service Indicators

Manage Service Indicators

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

ID begins with 🔍

Academic Career = ▼

National ID begins with

Campus ID begins with

Last Name begins with

First Name begins with

Case Sensitive

Search
Clear
Basic Search 🔍
Save Search Criteria

- Enter the student number into the **Campus ID** field
- Click on the **Search** button

Manage Service Indicators

Campus ID:

Display Effect All Institution University of Cape Town Refresh 🔄

+ Add Service Indicator

Service Indicator Summary									
Code	Code Description	Reason Description	Institution	Start Term	End Term	End Term Description	Start Date	End Date	

+ Add Service Indicator

- Click on the + button next to **Add Service Indicator**



Add Service Indicator

Tania Vossgatter

*Institution University of Cape Town

*Service Indicator Code

*Reason

Description

Effect

Effective Period

Start Term End Term

Start Date End Date

Assignment Details

*Department

Reference

Amount Currency

Contact Information

Contact ID Contact Person

Placed Person ID Placed By

Comments

Services Impacted

No Impacts are associated with the selected Service Indicator Code.

Service Indicator Date Time

User ID

- Click in the **Service Indicator Code**

Add Service Indicator

Tania Vossgatter

*Institution University of Cape Town

*Service Indicator Code

*Reason

Description

Effect

- Type in **MOU**

Add Service Indicator

Tania Vossgetter 1383142

*Institution University of Cape Town

*Service Indicator Code Memorandum of Understanding

*Reason Progress and Planned Activity

Description
You must complete your Progress and Planned Activity before you are allowed to register for the year.

Effect Negative Service Indicator

- Type in **PPA** or **MoU**

Effective Period

Start Term 2021

End Term

Start Date

End Date

- Type in **1211** in the **Start Term** for 2021

Comments

Services Impacted

Impact	Description	Basis - Date	Basis - Term	Term Category
1 CENR	No Enrollment Activities	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Service Indicator Date Time 23/10/2020 3:06:28PM

User ID 01373566 Paul,Steenkamp

- Click **OK**

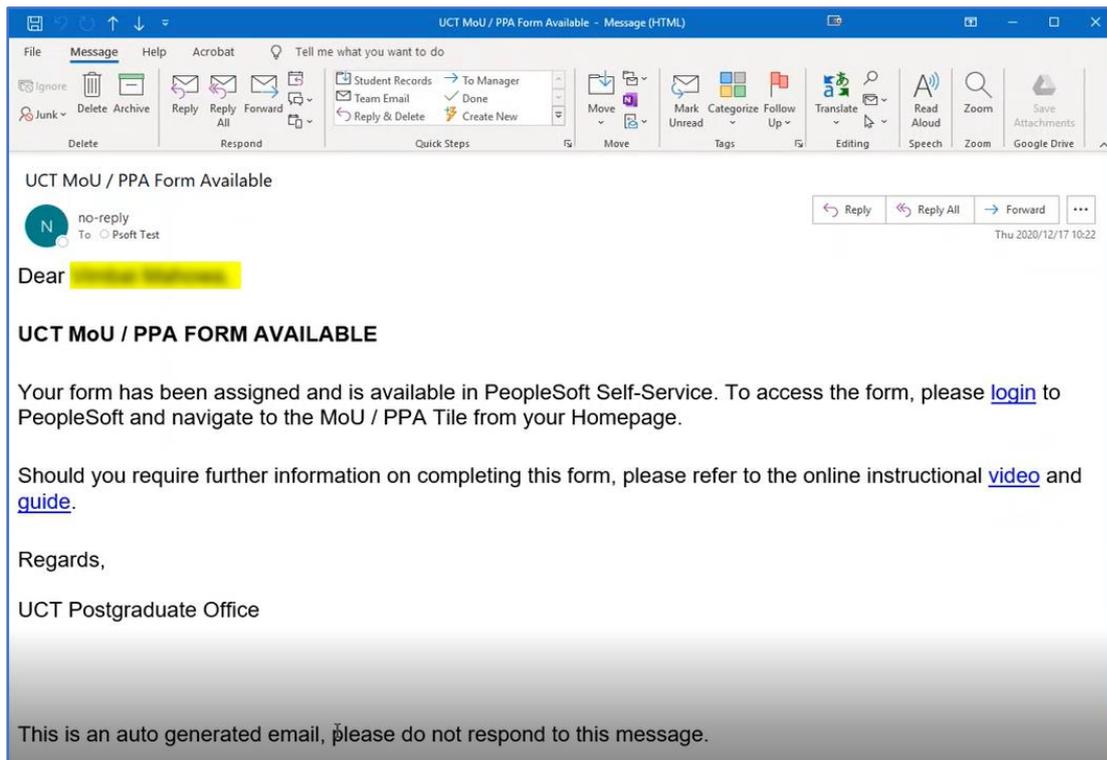
Manage Service Indicators

Display Effect Institution Refresh

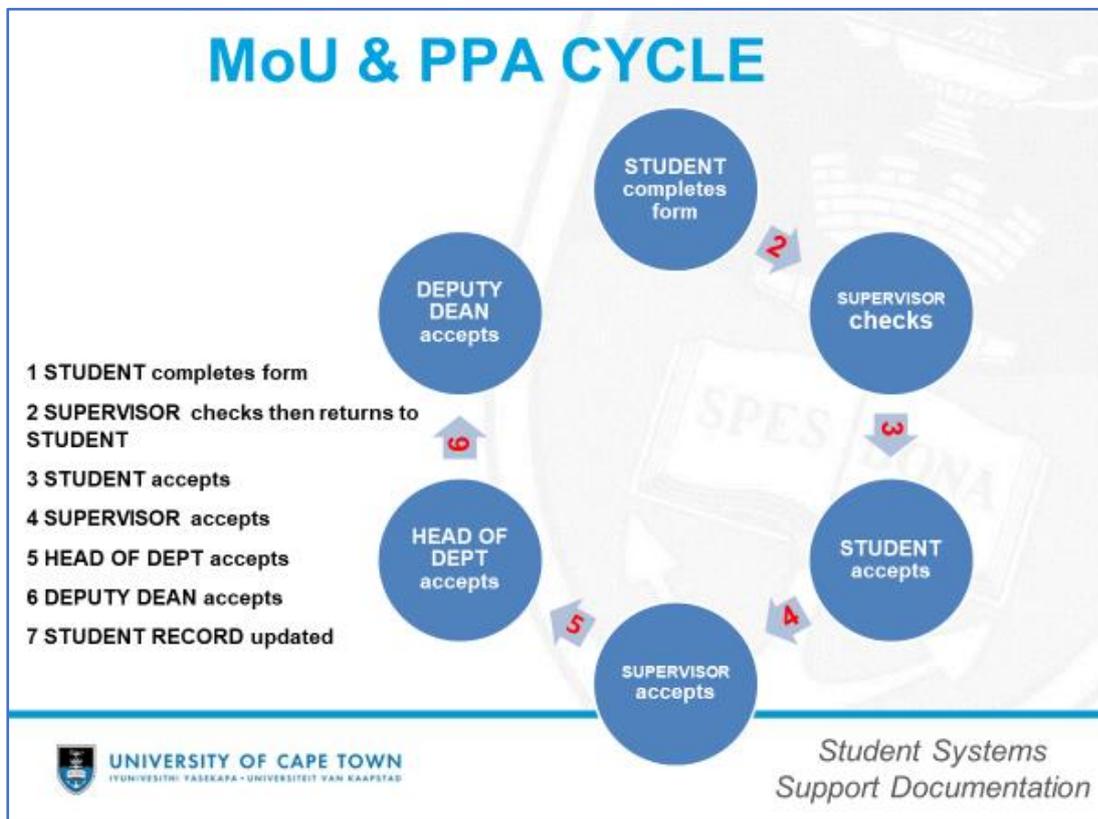
Service Indicator Summary

Code	Code Description	Reason Description	Institution	Start Term	End Term	End Term Description	Start Date	End Date
MOU	Memorandum of Understanding	Progress and Planned Activity	UCT01	1211	2021			

Note This process will automatically send an email notification to the student to log on to PeopleSoft and prompt the student to click on the MoU/PPA tile on the student homepage.



This is an example of the email the student will receive once the service indicator has been processed.

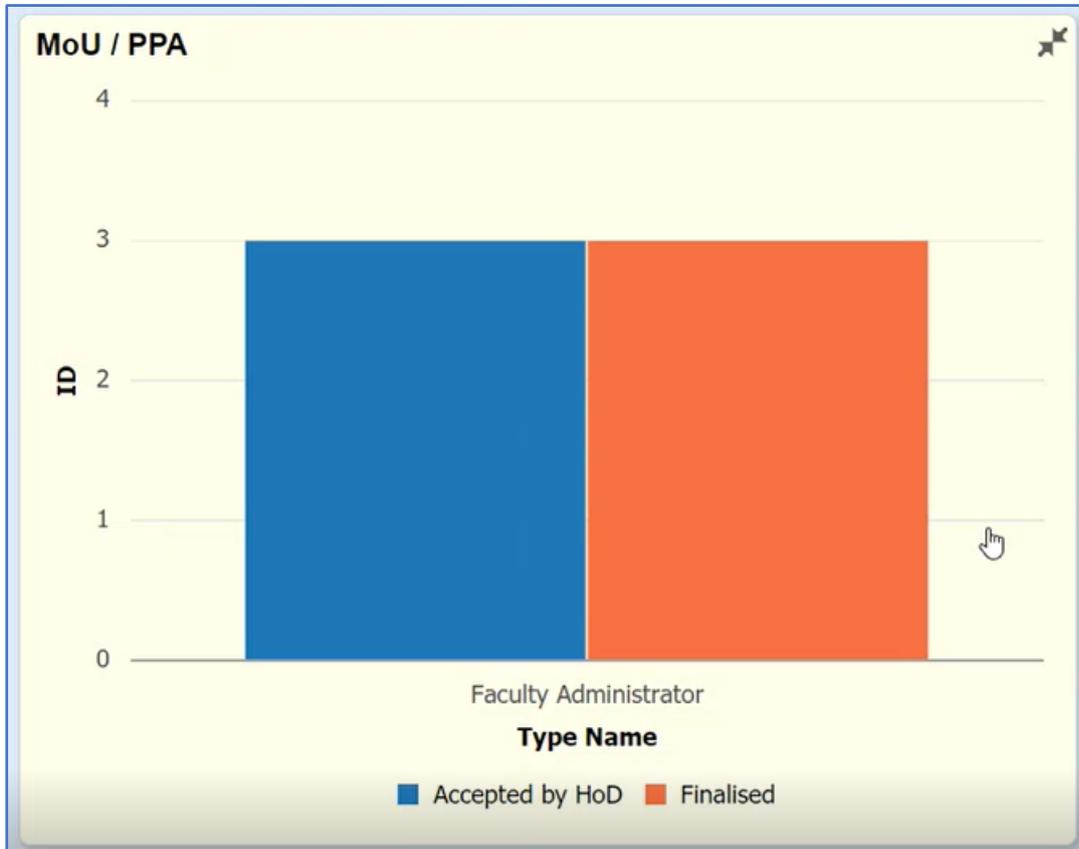


The MoU / PPA cycle that needs to be followed depending on the research student.



Lesson 3: Monitoring MoU and PPA Submissions

This shows the administrator how to monitor and manage the MoU and PPA forms in PeopleSoft. Once the staff administrator has received access and has logged into PeopleSoft, they will see the tile below:



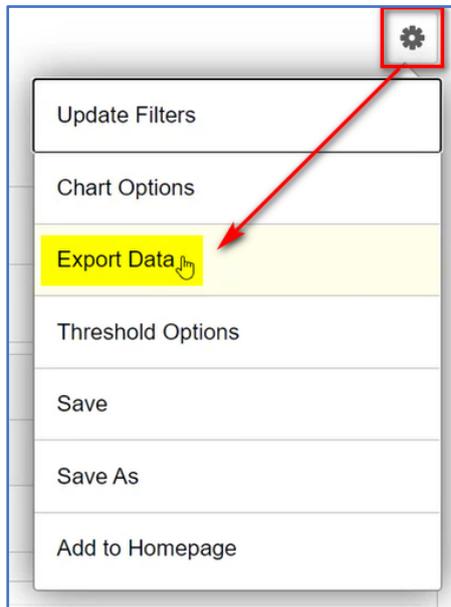
The Faculty Administrator will log into PeopleSoft and see the MoU / PPA tile.

- Click on the **MoU / PPA** tile

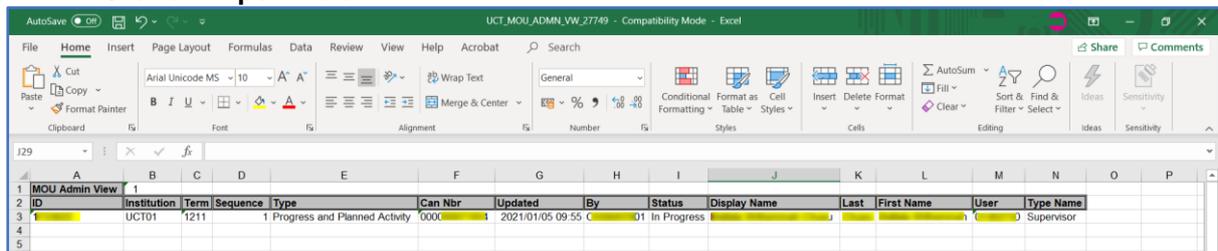
The screenshot shows the PeopleSoft interface for "MoU / PPA". On the left, there are search filters: "Term" with the value "1201", "Status" with "Accepted by HoD (3)" and "Finalised (3)", and "Type Name" with "Faculty Administrator (6)". The main area displays a "Pivot Grid" with columns for "Values" and "Status", and a row for "Type Name". The grid shows 3 "Accepted by HoD" and 3 "Finalised" submissions for "Faculty Administrator". Below the grid is a bar chart similar to the one in the previous figure.

Type Name	ID (Count)	
	Accepted by HoD	Finalised
Faculty Administrator	3	3

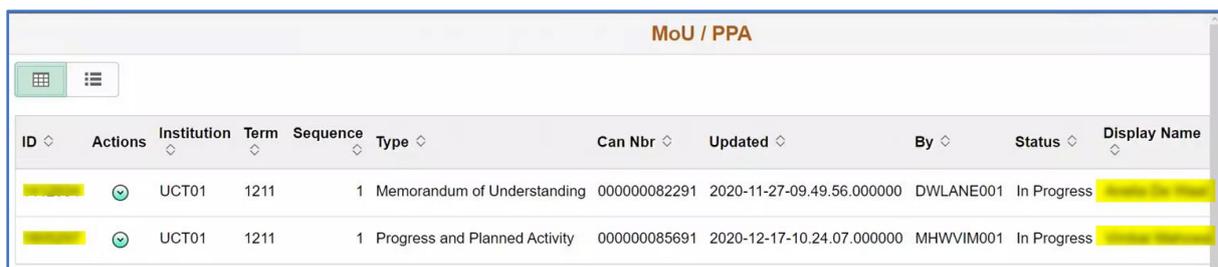
- Click on the **Accepted by HOD 3 or Finalised 3** to view the MoU or PPA forms



- Click on the **settings gear**
- Click on **Export Data**

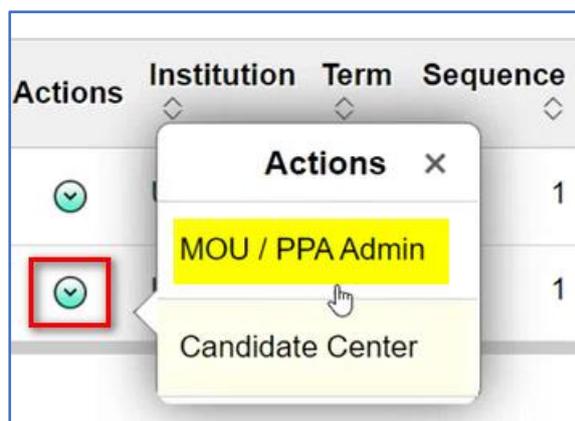


This will export all the records to an excel spreadsheet so you may view all the relevant information in the forms.

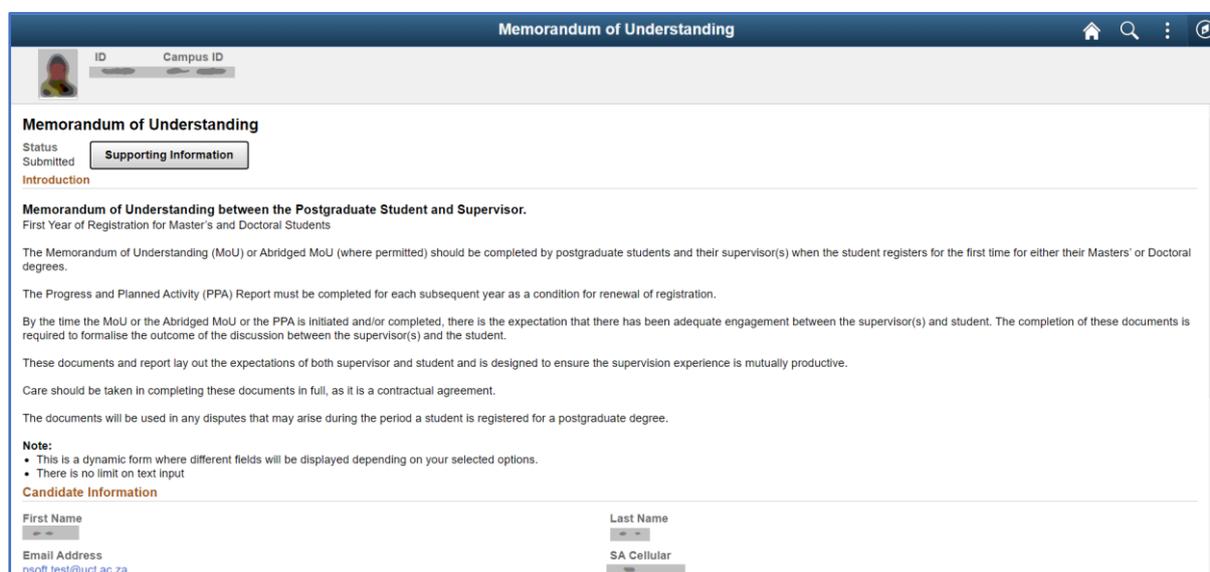


If you select the **Accepted by HOD or Finalised** options, then the **Actions** window appears.

You may select the relevant student from the list that appears.



- Click on the dropdown **arrow** then select **MOU/PPA Admin**



The student's form will appear; however, you will not be able to make any changes. It will be available to review and export to other parties.

Frequently Asked Questions

Q: I can't find my primary supervisor's detail?

A: Ensure the supervisor is a UCT staff member and linked in the administrator profile in PeopleSoft.

Q: I am unable to submit the form (student)

A: Check that all required fields have been populated

Q: I am unable to register there is a "hold" on my record

A: The MoU or PPA needs to be accepted by supervisor and or HOD and or Deputy Dean (History)

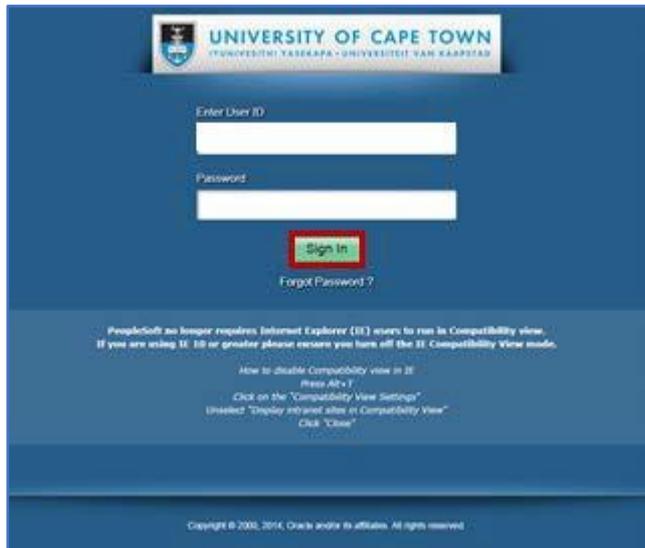
Q: My university does not appear in the institution list, I cannot submit the form

A: Select "Foreign University" in the interim

Lesson 4: Student Log In

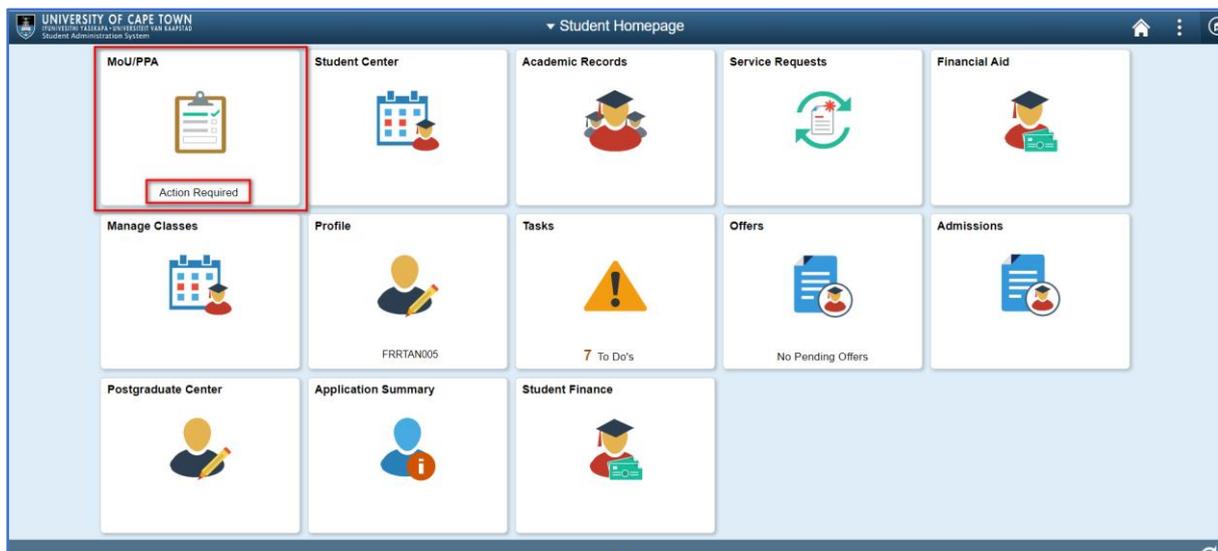
Your first task is to login into the PeopleSoft student administration system, which is used to administer student records at UCT. You will be required to enter alpha numeric student number and a student network password.

- Go to the UCT website: <http://studentonline.uct.ac.za/>



- The **PeopleSoft Login** page will appear

You will be required to enter your **Student Number** and **Network Password**.

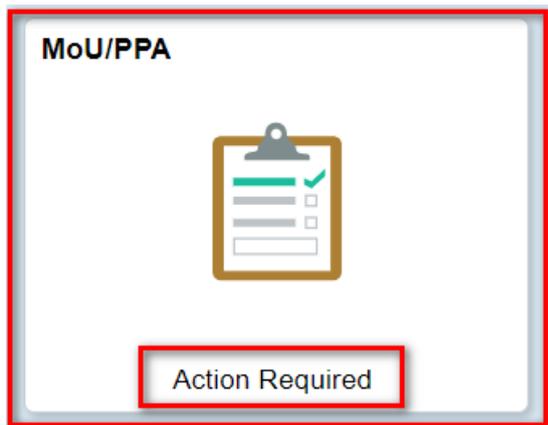


- The **PeopleSoft Student Homepage** page will be displayed.

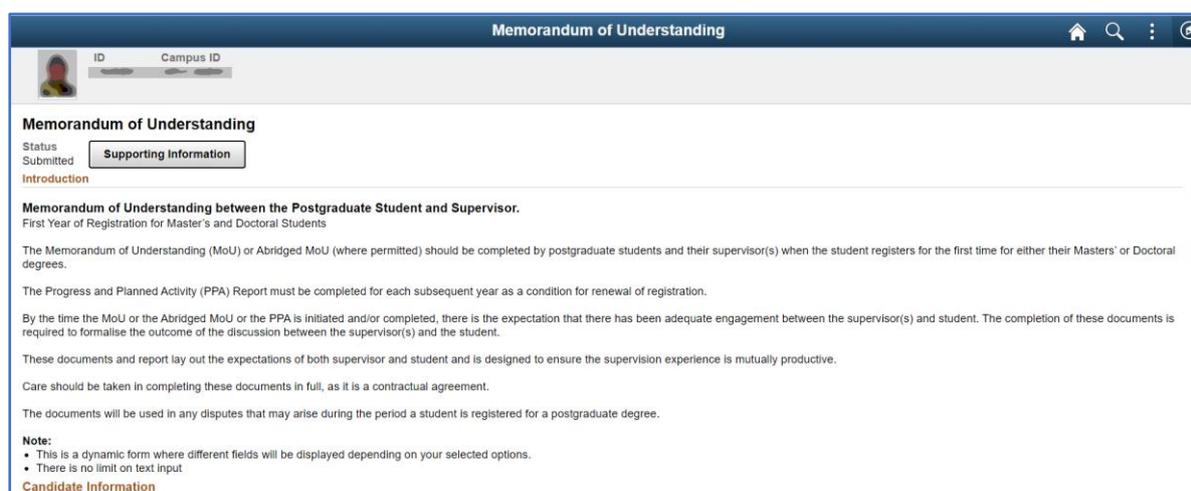
Lesson 5: Student Viewing the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form

To view your record which requires completion, use the following actions:

Note All post-graduate students who have been term activated and matriculated will have Action Required for MoU or PPA forms and will appear on the MoU / PPA tile



- Click on the **MoU/PPA** tile



- The **Memorandum of Understanding (MoU) or Progress or Planned Activity (PPA)** will appear



Note:

- This is a dynamic form where different fields will be displayed depending on your selected options.
- There is no limit on text input

Candidate Information

First Name

Last Name

Email Address

psoft.test@uct.ac.za

SA Cellular

Campus Email

Home (Phone)

- ▶ All Academic Qualifications
- ▶ Qualification Information
- ▶ Thesis Information
- ▶ Supervisor Details
- ▶ Supervisor Expectations and Commitments
- ▶ Expectations and Plans of the Student
- ▶ Funding
- ▶ Authorship, Third party data and Intellectual Property
- ▶ Ethics in Research and Biosafety
- ▶ Agreements
- ▶ History

- Scroll down the page to see all the **information fields**

Memorandum of Understanding

ID Campus ID

▼ All Academic Qualifications

Year	Academic Career	Field of Study
2019	Honours	chemistry

This is important information for students registering for interdisciplinary degrees

▼ Qualification Information

Academic Plan
SM001PHY01 Physics

Candidate Number

Faculty Science Department Department of Physics

Is this a jointly awarded or co-badged degree?
No

I have checked my Faculty-specific requirements and understand that, for example, the word limit for a Research Masters dissertation maybe 50 000 words or 90 pages.

Agree

▼ Thesis Information

Provisional thesis/dissertation title or area of study
Test data

Attached File	Date	View
MoU_Testing.docx	2020-10-23	View

- Check all the **fields** ensuring the correct information has been entered



All Academic Qualifications

All Academic Qualifications			2 rows
Year	Academic Career	Field of Study	
2015	Honours	BMus Hons	-
2014	Undergraduate	BMus in Dance	-

- Enter and check the **All Academic Qualifications** are correct
- Click on the sign to add additional information

Degrees

*External Org ID

Description

*Academic Career

*Year

*Field of Study

- Select the **External Org ID** to choose the institution

Lookup

Search for: External Org ID

Search Criteria [Show Operators](#)

External Org ID
(begins with)

Description
(begins with)

Search Name
(begins with)

City
(begins with)

State
(begins with)

Country
(begins with)

Search Results

Only the first 300 results can be displayed.

300 rows

External Org ID	Description	Search Name	City	State	Country
1005555	Zimbabwe Uni Evening School	ZIMBABWEUNIEVENINGSCHOOL	Harare		ZWE
1005937	Andrews University	ANDREWSUNIVERSITY	Michioan 49104	Usa	

- Select the institution from the **dropdown** menu to add an **External Org ID**



Degrees

*External Org ID

Description

*Academic Career

*Year

*Field of Study

- Doctoral
- Extra Mural Studies
- GSB (Postgraduate Programmes)
- GSB (Undergraduate Programmes)
- Honours
- Masters
- Post-Doctoral
- Postgrad Non-Degree
- Postgraduate Diploma
- Professional Development
- Undergrad Health Sciences
- Undergrad Non-Degree
- Undergraduate

- Select the appropriate **Academic Career** from the **dropdown menu**
- Insert the correct **Year**
- Insert the correct **Field of Study**



- Click on **Save**

Qualification Information

The **Qualification Information** field contains the information regarding the academic plans which you are registered for.

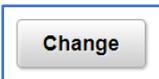


- Click on the **Qualification Information** field

▼ **Qualification Information**

Academic Plan HM042EDN03 Higher Education Studies	<input type="button" value="Change"/>
Candidate Number 0000000	
Faculty Humanities	Department School of Education
Is this a jointly awarded or co-badged degree? <input type="radio"/> No <input checked="" type="radio"/> Yes	
I have checked my Faculty-specific requirements and understand that, for example, the word limit for a Coursework Master's dissertation may be 25,000 words or 60 pages. <input type="radio"/> Disagree	

- The **Qualification Information** field will expand and appear



- Click **Change** if the incorrect details appear for the academic program

Cancel
Plans
Done ×

Academic Career ◇	Candidate Number ◇	Academic Plan ◇	Description ◇
Masters	0000000	HM042EDN03	
Masters	0000000	HM042EDN03	

- Click the correct **Academic Career** to make the change required

Is this a jointly awarded or co-badged degree?

No i

- Select **Yes** if the degree is jointly awarded and leave as **No** if it is not jointly awarded

Cancel
Joint Degree Policy
Done ×

A jointly awarded research degree means that you will be registered at two Universities for the same degree in terms of a formal contract.

A co-badged degree is awarded by one institution which recognises the contributions of one or more partner institutions by co-badging.

The following URL provide a reference for information on jointly awarded and co-badged degrees:

[Joint Degree Policy pdf](#)

- The **Joint Degree Policy** will appear if the degree is jointly awarded with the hyperlink to the **Joint Degree Policy pdf**

I have checked my Faculty-specific requirements and understand that, for example, the word limit for a Coursework Master's dissertation may be 25,000 words or 60 pages.

Disagree

I have checked my Faculty-specific requirements and understand that, for example, the word limit for a Coursework Master's dissertation may be 25,000 words or 60 pages.

Agree

- You must slide the button from **Disagree** to **Agree**, on the dissertation limits



Thesis Information

▶ Thesis Information

- Click on the **Thesis Information** field

Provisional thesis/dissertation title or area of study

Attached File	Add
	<div style="border: 1px solid #ccc; padding: 2px 5px; display: inline-block;">Add</div>

- Type in your **thesis/dissertation title**
- Click **Add** to upload your thesis/dissertation title proposal

File Attachment

Choose From



My Device

- The **File Attachment** window will open
- Click on **My Device**

Choose From



My Device

Upload

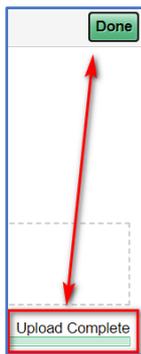
Clear



thesis.pdf

File Size: 6KB

- Click on **Upload** to save the file to the form



- Click on **Done** after seeing **Upload Complete**

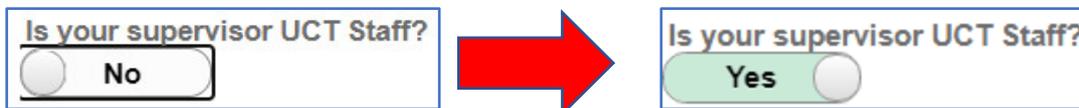
Attached File	Date	View
thesis.pdf	2020-10-05	View

- Click on **View** to check the file that you uploaded.

Supervisor Details



- Click on the **Supervisor Details** field



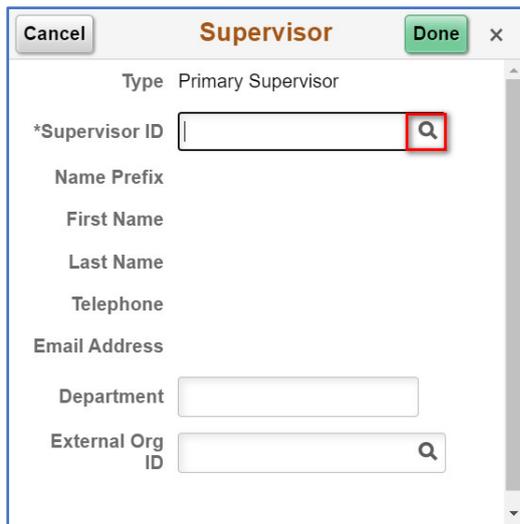
- Slide the button to yes

Supervisor Details		
Is your supervisor UCT Staff? Yes	Any Co-Supervisors? No	
Type	Supervisor ID	Display Name
Primary Supervisor		

- Enter and check the **Supervisor Details** are correct

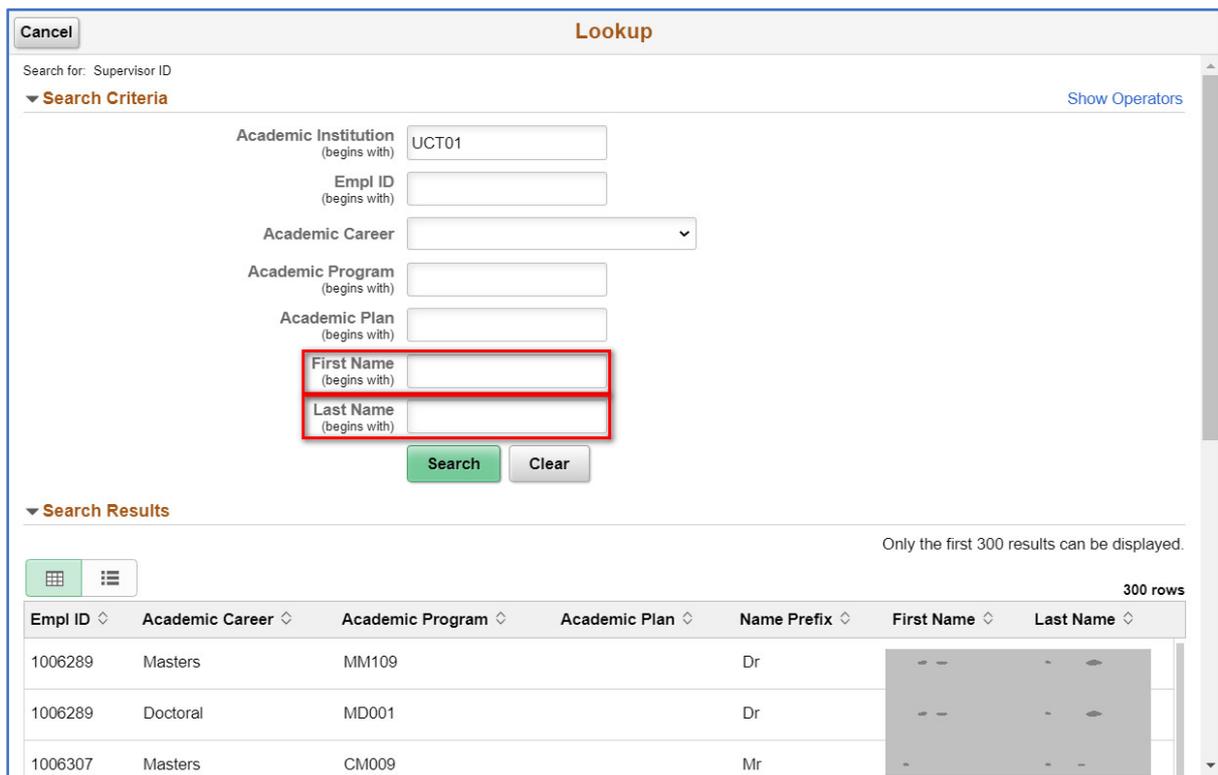
Type	Supervisor ID	Display Name
Primary Supervisor		

- Click on the **arrow** at the end of the row



The Supervisor search window is titled "Supervisor" and includes a "Cancel" button on the left and a "Done" button on the right. The "Type" is set to "Primary Supervisor". The fields include: *Supervisor ID (with a magnifying glass icon), Name Prefix, First Name, Last Name, Telephone, Email Address, Department, and External Org ID (with a magnifying glass icon).

- The **Supervisor** search window will appear
- Click on the magnify glass 



The Lookup window is titled "Lookup" and includes a "Cancel" button on the left. It shows a search for "Supervisor ID". Under "Search Criteria", there are fields for: Academic Institution (beginning with) UCT01, Empl ID (beginning with), Academic Career (dropdown), Academic Program (beginning with), Academic Plan (beginning with), First Name (beginning with), and Last Name (beginning with). The "First Name" and "Last Name" fields are highlighted with a red box. Below these fields are "Search" and "Clear" buttons. Under "Search Results", there is a note "Only the first 300 results can be displayed." and a table with 300 rows. The table has columns: Empl ID, Academic Career, Academic Program, Academic Plan, Name Prefix, First Name, and Last Name. The first three rows are visible:

Empl ID	Academic Career	Academic Program	Academic Plan	Name Prefix	First Name	Last Name
1006289	Masters	MM109		Dr		
1006289	Doctoral	MD001		Dr		
1006307	Masters	CM009		Mr		

- Type in the **First Name** and **Last Name** of the Supervisor
- Click on the **Search** button 

▼ Search Results

Only the first 300 results can be displayed.

300 rows

Empl ID	Academic Career	Academic Program	Academic Plan	Name Prefix	First Name	Last Name
-	Masters	MM109		Dr	-	-
-	Doctoral	MD001		Dr	-	-
-	Masters	CM009		Mr	-	-

- Click on the **Supervisor** name allocated to you in the list that appears

▼ Supervisor Expectations and Commitments

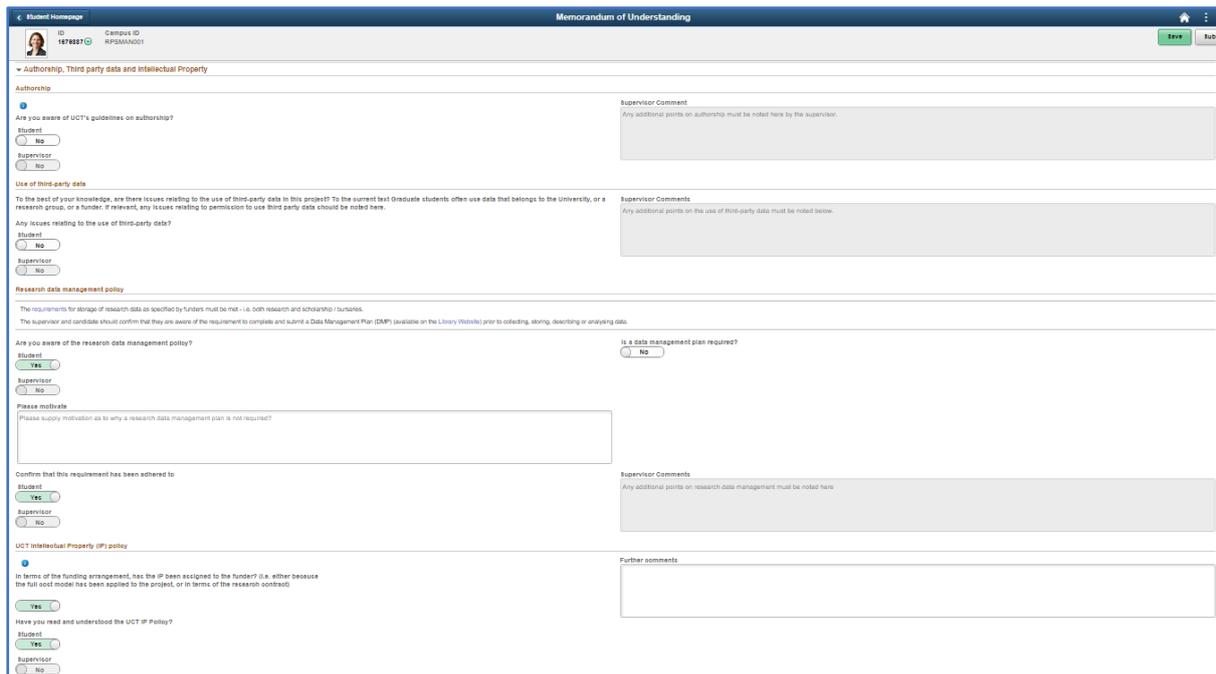
<p>Supervisor's Expectations</p> <p>The Supervisor must set out what they expect of the Student in terms of reaching certain milestones or goals during the research for the degree.</p>	<p>Summary of other expectations</p> <p>A summary of any other expectations that the Supervisor has from the Student (For example: Teaching in department, attending departmental seminars etc).</p>
<p>Supervisor's Commitments</p> <p>The Supervisor must set out what they expect of the Student in terms of reaching certain milestones or goals during the research for the degree.</p>	<p>Supervisor's Leave Arrangement</p> <p>Summarise expected absence of Supervisor(s) on research leave/sabbaticals. Explain what arrangements will be made for supervision during periods of absence, and how lines of communication will be maintained.</p>
<p>Supervisor's Role</p>	

- Check the **Supervisor Expectations and Commitments** type in the required comments

▼ Expectations and Plans of the Student

<p>Expectations from the Supervisor(s) and the department</p> <p>The Student must set out in detail the expectations from the Supervisor(s) and the department (For example: Access to Supervisor and facilities, etc)</p>	<p>Agreed plan</p> <p>The Student and Supervisor must set out their agreed plan what are you expecting to do for the research project.</p>
<p>Agreed broad timetable</p> <p>Estimated timing of presentation and or submission of formal research proposal for candidacy (where applicable) The literature review completed by: Data collection completed by (where applicable): Data analyses completed by (where applicable): Submission of dissertation/thesis completed by:</p>	<p>Comment by the Supervisor on the plan</p>
<p>Re-registration will be dependent on the Student meeting the commitments stated above.</p> <p>Logistics</p> <p>Outline arrangements to support the research plan (For example: Field work, laboratory work, access to computational resources and equipment, data collection and storage, performance, interviews etc).</p>	<p>Employment and teaching commitments at UCT by the Student</p> <p>Employment and teaching commitments at UCT by the Student, and what mentorship/support is given to enable students to undertake these activities.</p>
<p>Skills required, courses and classes</p> <p>List any lectures, workshop or course(s) that the student must attend, to enhance their research skills or knowledge. Clarify the responsibility for costs associated with these (if any).</p>	<p>Student's leave arrangement</p> <p>The student and supervisor should state their agreement below on the timing and length of the Student's leave entitlement.</p>

- Check the **Expectations and Plans of the Student** and type in the required comments under **Comment by the Student on the plan**



Authorship, Third party data and Intellectual Property

Authorship

Are you aware of UCT's guidelines on authorship?

Student: No

Supervisor: No

Use of third-party data

To the best of your knowledge, are there issues relating to the use of third-party data in this project? To the current level Graduate students often use data that belongs to the University, or a research group, or a funder. If relevant, any issues relating to permission to use third party data should be noted here.

Any issues relating to the use of third-party data?

Student: No

Supervisor: No

Research data management policy

The requirements for storage of research data as specified by funders must be met - i.e. both research and scholarship / courses.

The supervisor and candidate should confirm that they are aware of the requirement to complete and submit a Data Management Plan (DMP) (available on the Library Website) prior to collecting, storing, describing or analysing data.

Are you aware of the research data management policy?

Student: Yes

Supervisor: No

Please motivate:

Please supply motivation as to why a research data management plan is not required?

Confirm that this requirement has been adhered to:

Student: Yes

Supervisor: No

UCT Intellectual Property (IP) policy

In terms of the funding arrangement, has the IP been assigned to the funder? (i.e. either because the full-cost model has been applied to the project, or in terms of the research contract)

Yes

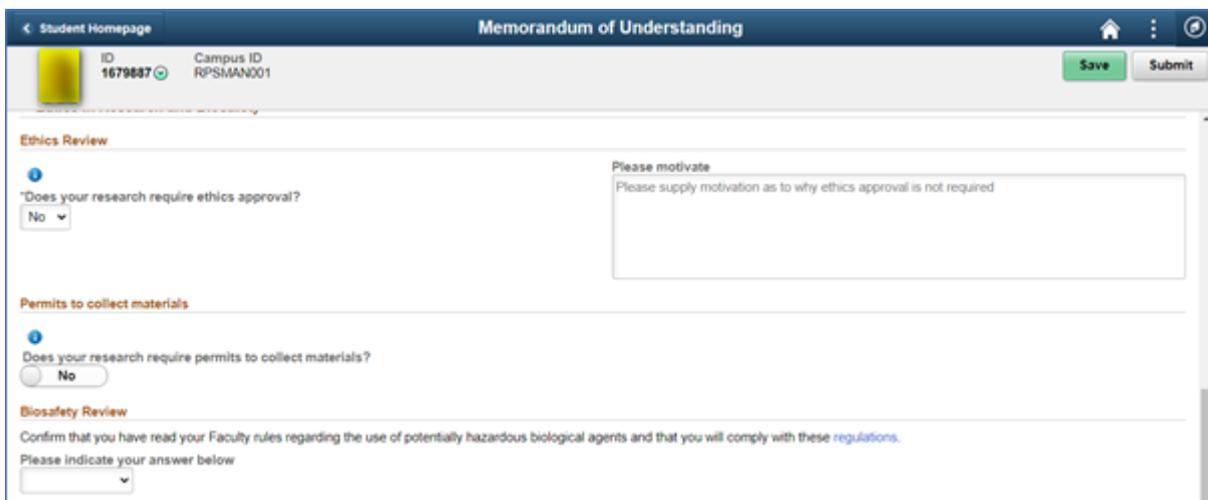
Have you read and understood the UCT IP Policy?

Student: Yes

Supervisor: No

Note if ethical clearance is required, it must be inserted at this point

- Ethics in Research and Biosafety
- Agreements



Ethics Review

Does your research require ethics approval?

No

Please motivate:

Please supply motivation as to why ethics approval is not required

Permits to collect materials

Does your research require permits to collect materials?

No

Biosafety Review

Confirm that you have read your Faculty rules regarding the use of potentially hazardous biological agents and that you will comply with these regulations.

Please indicate your answer below



Student Homepage Memorandum of Understanding

ID 1679887 Campus ID RPSMAN001 Save Submit

Agreements

Presentation of Research Findings & Submission of the Thesis

I have read and understood my Faculty and the University's guidelines on what constitutes plagiarism.

No

I confirm that I have read and understood the requirements for archiving theses or dissertations.

No

Are you (student or supervisor) likely to apply for deferred publication?

No

Is the study funded by the NRF?

No

Comments

Social Media

I confirm that I have read and understood the guidelines on social media

No

Dispute Resolution Procedures and Communication Channel

The supervisor(s) and student acknowledge by checking the box below, that they have read the University's Conflict Resolution Process in the event of disputes arising from agreements reached in this MOU or a breakdown in the student supervisor relationship.

Supervisor

No

Student

No

Are you aware of the channel to be followed if there is a supervisor/student communication break down?

No

Comments

Submit

- Click **Submit** once the form has been completed

Note Once the Student has selected Submit a notification email will be sent to the Supervisor to check the submission, when the Supervisor submits the form, the form will be returned to the Student to Accept the MoU or PPA



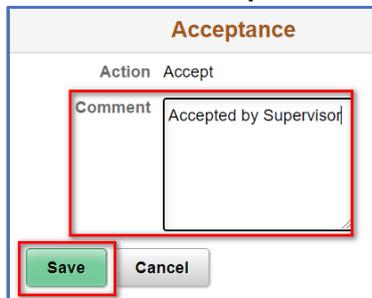
Lesson 6: Student Accepting the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form

The student will log back into PeopleSoft after receiving an email notification that the supervisor has submitted the MoU or PPA form.

When all the information has been verified and checked the student may approve the MoU or PPA form.



- Click **Accept**



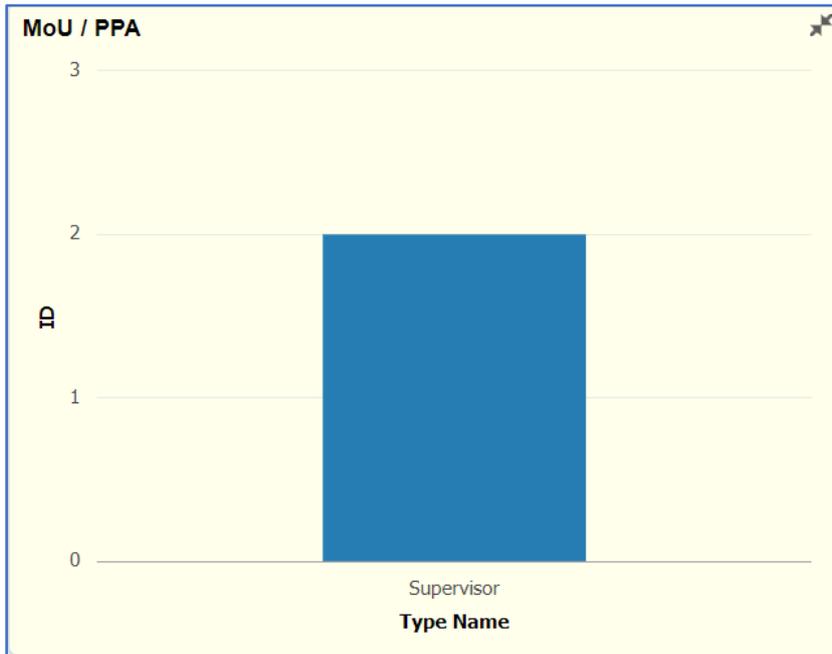
- Enter a comment in the **Comment** box
- Click **Save**



Lesson 7: Supervisor Viewing the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form

To view the student record of the post-graduate students which require your approval, use the following actions:

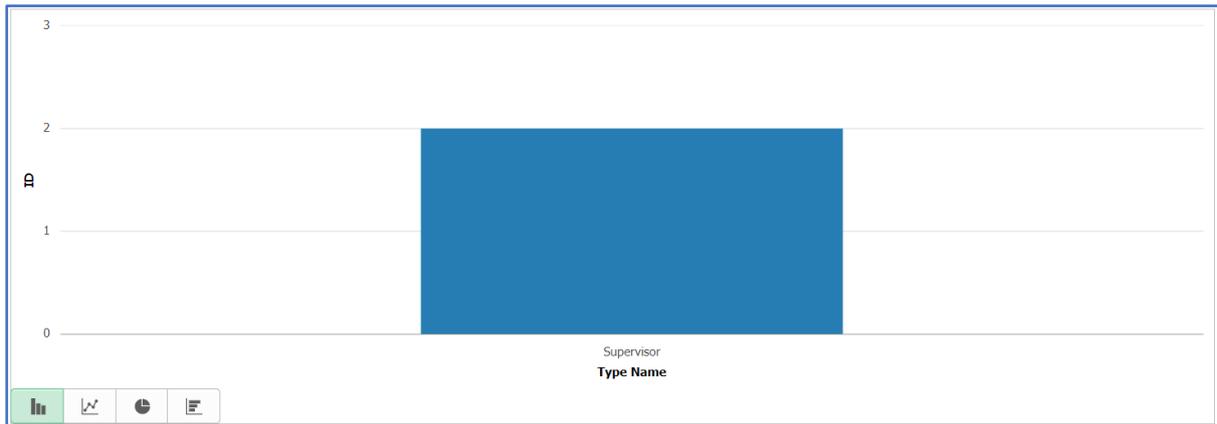
Note All post-graduate students who have submitted MoU or PPA forms will appear on the MoU and PPA Approvals



- Click on the **Submitted** bar in the **MoU/PPA** tile

Column	Values	Status
Row	Type Name	
Supervisor	ID (Count)	Submitted
		2

- The **Pivot Grid** screen will appear

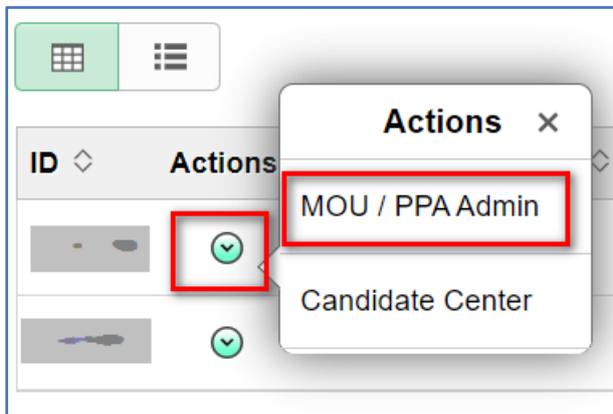


- Click on the **Submitted bar**

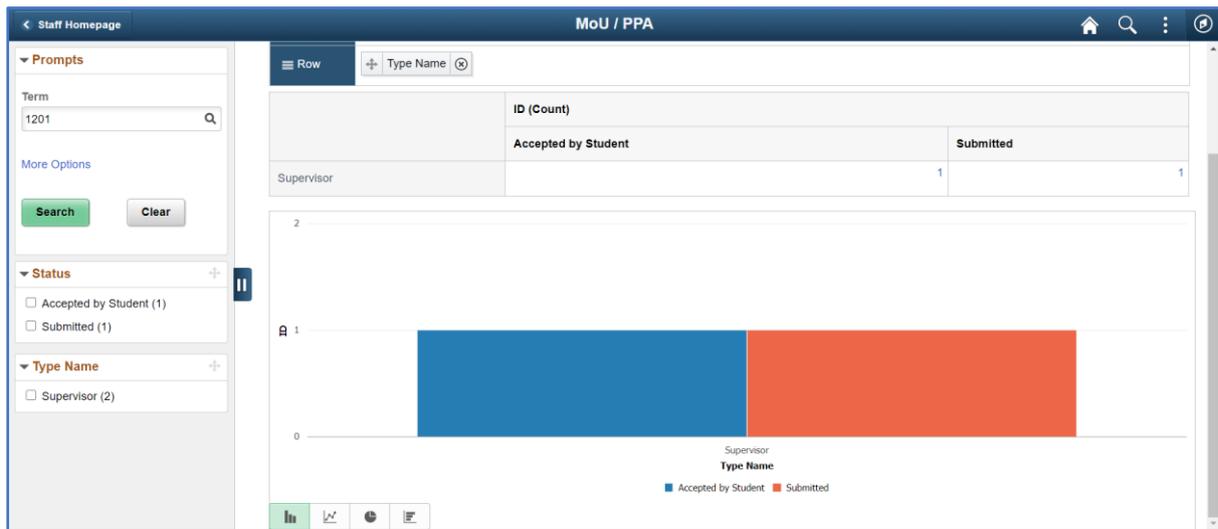
Staff Homepage MoU / PPA

ID	Actions	Institution	Term	Sequence	Type	Can Nbr	Updated	By	Status	Display Name	User	Type Name
		UCT01	1201	1	Progress and Planned Activity	000000084301	2020-10-23-10.36.45.000000		Submitted			Deputy Dean
		UCT01	1201	1	Memorandum of Understanding	000000077355	2020-10-23-10.27.26.000000		Submitted			Deputy Dean

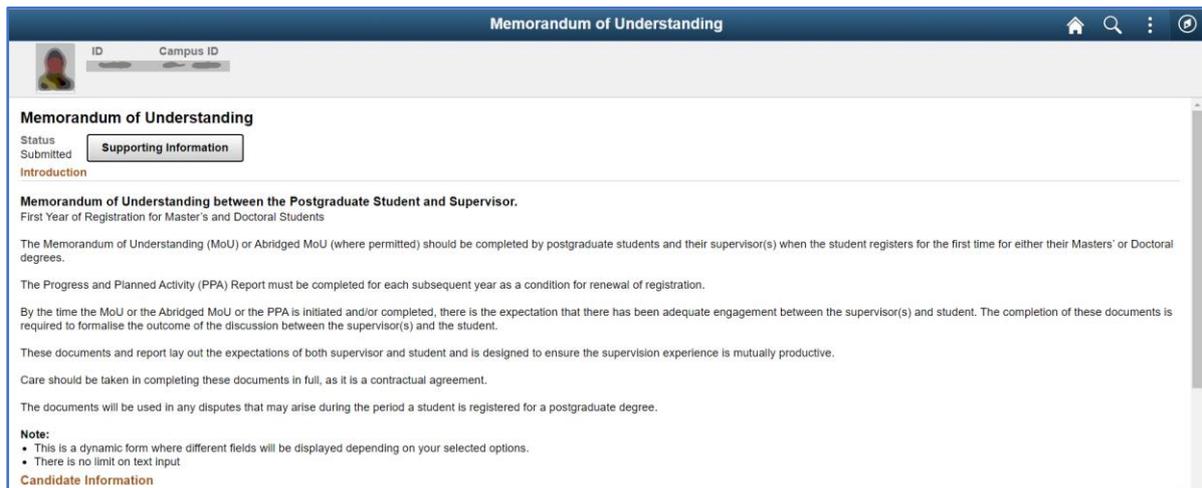
- The **Actions** list will appear.



- Select the **dropdown** menu and the **MOU/PPA Admin Actions** menu will appear
- Click on **MOU/PPA Admin**



- The **Pivot Grid** screen will appear



The screenshot shows a form titled "Memorandum of Understanding". It includes fields for "ID" and "Campus ID", a "Status" dropdown set to "Submitted", and a "Supporting Information" button. The main content area contains an "Introduction" section with the following text:

Memorandum of Understanding between the Postgraduate Student and Supervisor.
First Year of Registration for Master's and Doctoral Students

The Memorandum of Understanding (MoU) or Abridged MoU (where permitted) should be completed by postgraduate students and their supervisor(s) when the student registers for the first time for either their Masters' or Doctoral degrees.

The Progress and Planned Activity (PPA) Report must be completed for each subsequent year as a condition for renewal of registration.

By the time the MoU or the Abridged MoU or the PPA is initiated and/or completed, there is the expectation that there has been adequate engagement between the supervisor(s) and student. The completion of these documents is required to formalise the outcome of the discussion between the supervisor(s) and the student.

These documents and report lay out the expectations of both supervisor and student and is designed to ensure the supervision experience is mutually productive.

Care should be taken in completing these documents in full, as it is a contractual agreement.

The documents will be used in any disputes that may arise during the period a student is registered for a postgraduate degree.

Note:

- This is a dynamic form where different fields will be displayed depending on your selected options.
- There is no limit on text input.

Candidate Information

- The **Memorandum of Understanding** will appear



Note:

- This is a dynamic form where different fields will be displayed depending on your selected options.
- There is no limit on text input

Candidate Information

First Name

Last Name

Email Address

psoft.test@uct.ac.za

SA Cellular

Campus Email

Home (Phone)

- ▶ All Academic Qualifications
- ▶ Qualification Information
- ▶ Thesis Information
- ▶ Supervisor Details
- ▶ Supervisor Expectations and Commitments
- ▶ Expectations and Plans of the Student
- ▶ Funding
- ▶ Authorship, Third party data and Intellectual Property
- ▶ Ethics in Research and Biosafety
- ▶ Agreements
- ▶ History

- Scroll down the page to see all the **information fields**

Memorandum of Understanding

ID Campus ID

▼ All Academic Qualifications

Year	Academic Career	Field of Study
2019	Honours	chemistry

This is important information for students registering for interdisciplinary degrees

▼ Qualification Information

Academic Plan
SM001PHY01 Physics

Candidate Number

Faculty: Science Department: Department of Physics

Is this a jointly awarded or co-badged degree?
No

I have checked my Faculty-specific requirements and understand that, for example, the word limit for a Research Masters dissertation maybe 50 000 words or 90 pages.

Agree

▼ Thesis Information

Provisional thesis/dissertation title or area of study
Test data

Attached File	Date	View
MoU_Testing.docx	2020-10-23	View

- Check all the **fields** ensuring the correct information has been entered



Supervisor Details

Is your supervisor UCT Staff? Yes Any Co-Supervisors? No

Type	Supervisor ID	Display Name
Primary Supervisor		

- Check the **Supervisor Details** are correct

Supervisor Expectations and Commitments

Supervisor's Expectations
The Supervisor must set out what they expect of the Student in terms of reaching certain milestones or goals during the research for the degree.

Summary of other expectations
A summary of any other expectations that the Supervisor has from the Student (For example: Teaching in department, attending departmental seminars etc).

Supervisor's Commitments
The Supervisor must set out their plans for providing supervision, including the pattern and intended frequency of meetings, and their commitment to turnaround time for written responses to work submitted by Students.

Supervisor's Leave Arrangement
Summarise expected absence of Supervisor(s) on research leave/sabbaticals. Explain what arrangements will be made for supervision during periods of absence, and how lines of communication will be maintained.

Supervisor's Role

- Check the **Supervisor Expectations and Commitments** type in the required comments

Memorandum of Understanding

ID: 1545997 Campus ID: GRVCAM001

Expectations and Plans of the Student

Expectations from the Supervisor(s) and the department

Agreed plan

Agreed broad timetable

Comment by the Supervisor on the plan

Re-registration will be dependent on the Student meeting the commitments stated above.

Logistics

Employment and teaching commitments at UCT by the Student

Skills required, courses and classes

Student's leave arrangement

- Check the **Expectations and Plans of the Student** and type in the required comments under **Comment by the Supervisor on the plan**



Memorandum of Understanding

ID
Campus ID

Save
Submit

Authorship, Third party data and Intellectual Property

Authorship

Are you aware of UCT's guidelines on authorship?

Student: Yes

Supervisor: Yes

Supervisor Comments

Any additional points on authorship must be noted here by the supervisor.

Use of third-party data

To the best of your knowledge, are there issues relating to the use of third-party data in this project? To the current text Graduate students often use data that belongs to the University, or a research group, or a funder. If relevant, any issues relating to permission to use third party data should be noted here.

Any Issues relating to the use of third-party data?

Student: No

Supervisor: Yes

Supervisor Comments

Any additional points on the use of third-party data must be noted below.

Research data management policy

The requirements for storage of research data as specified by funders must be met - i.e. both research and scholarship / bursaries.

The supervisor and candidate should confirm that they are aware of the requirement to complete and submit a Data Management Plan (DMP) (available on the [Library Website](#)) prior to collecting, storing, describing or analysing data.

Are you aware of the research data management policy?

Student: Yes

Supervisor: Yes

Please motivate

Please supply motivation as to why a research data management plan is not required?

Is a data management plan required?

Student: No

Supervisor: Yes

Supervisor Comments

Any additional points on research data management must be noted here

UCT Intellectual Property (IP) policy

In terms of the funding arrangement, has the IP been assigned to the funder? (i.e. either because the full cost model has been applied to the project, or in terms of the research contract)

Yes

Have you read and understood the UCT IP Policy?

Student: Yes

Supervisor: Yes

Further comments

- Check the **Authorship, Third party data and Intellectual Property** and type in the required comments under **Supervisor Comments**



- Move the **Slider** from **No** to the **Yes** position

Note

Checks need to be performed on the remaining fields for omissions or errors:

- **Ethics in Research and Biosafety**
- **Agreements**



- Click **Submit** once the form has been checked and completed



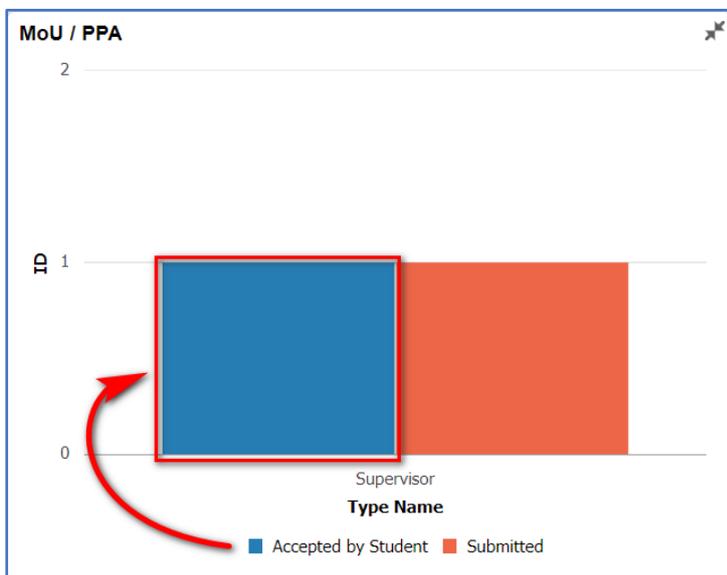
Note

Once the Supervisor has selected Submit a notification email will be sent to the student to accept the submission, when the student accepts the form, the form will be returned to the Supervisor to Accept or Decline the MoU or PPA

Lesson 8: Supervisor Approving or Declining the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form

The supervisor will log back into PeopleSoft after receiving an email notification that the student has accepted the MoU or PPA form.

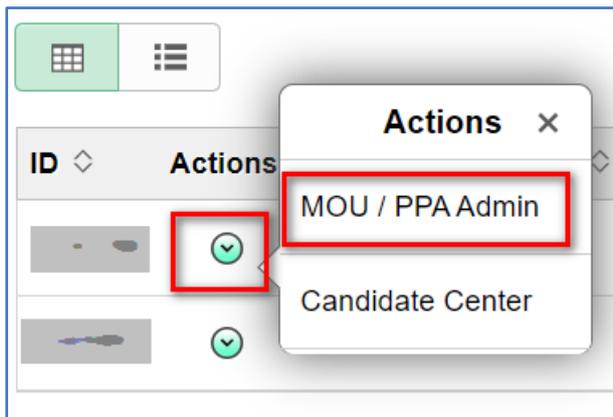
When all the information has been verified and checked the Supervisor may accept or decline the MoU or PPA form.



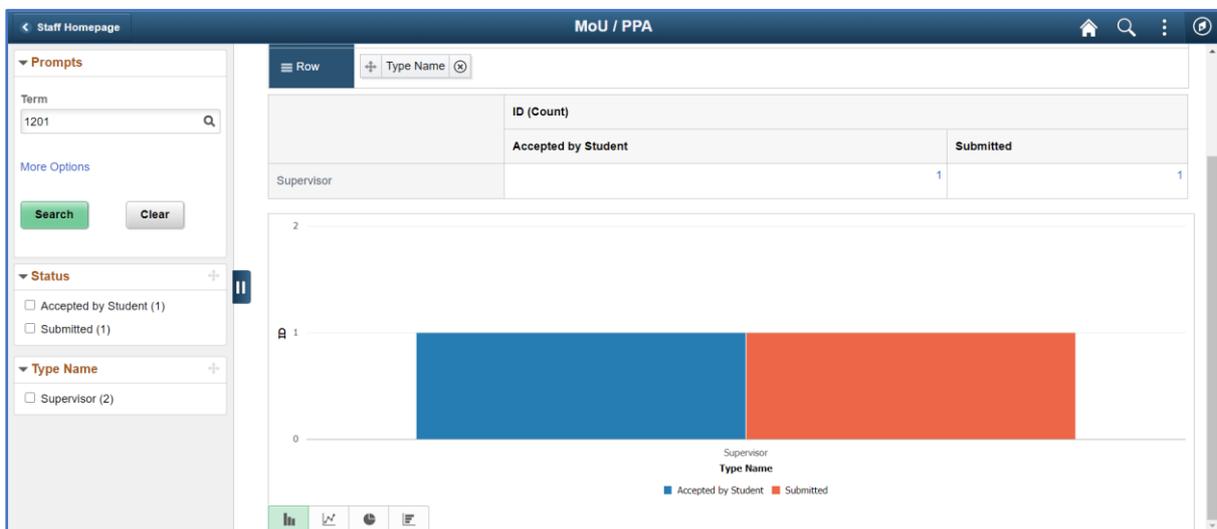
- Click the **Accepted by Student** bar graph

ID	Actions	Institution	Term	Sequence	Type	Can Nbr	Updated	By	Status	Display Name	User	Type Name
		UCT01	1201	1	Progress and Planned Activity	000000084301	2020-10-23-10.36.45.000000		Submitted			Deputy Dean
		UCT01	1201	1	Memorandum of Understanding	000000077355	2020-10-23-10.27.26.000000		Submitted			Deputy Dean

- The **Actions** list will appear.



- Select the **dropdown** menu and the **MOU/PPA Admin Actions** menu will appear
- Click on **MOU/PPA Admin**



- The **Pivot Grid** screen will appear
- Click the **Accepted by Student** bar graph



- Click **Decline**



Decline

Action Decline

Comment

- Enter a comment in the **Comment** box

Note After saving, the record will be saved, an email notification will be sent to the student that the document has been declined. The student will need to amend the form according to the comments and resubmit to the Supervisor.

Home Search Menu Help
Memorandum of Understanding

ID 1358510 Campus ID QWQPHU001

Memorandum of Understanding

Status Accepted by HoD

[Introduction](#)

- Click **Accept**

Acceptance

Action Accept

Comment

- Enter a comment in the **Comment** box
- Click **Save**

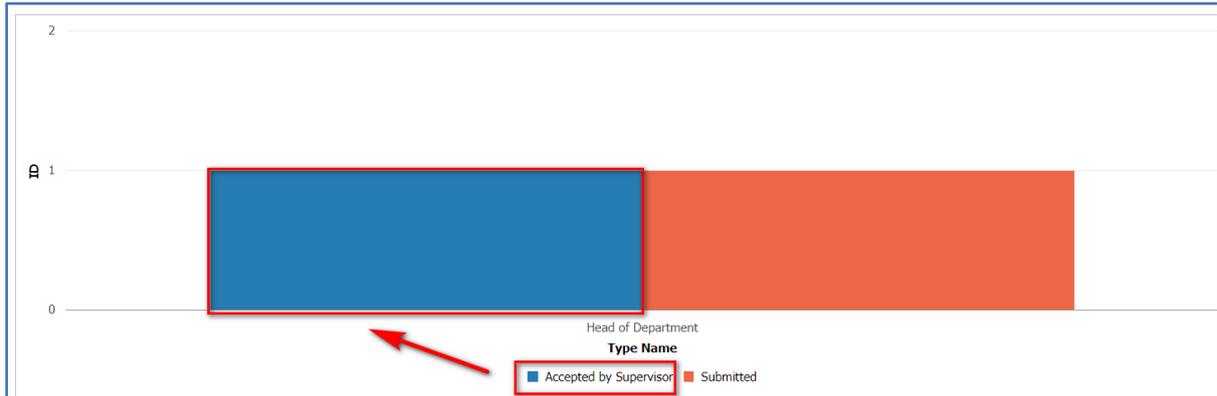
Note After saving, the record will be saved, and notification sent to the student and Head of Department that the document has been accepted and requires verification by the Head of Department.



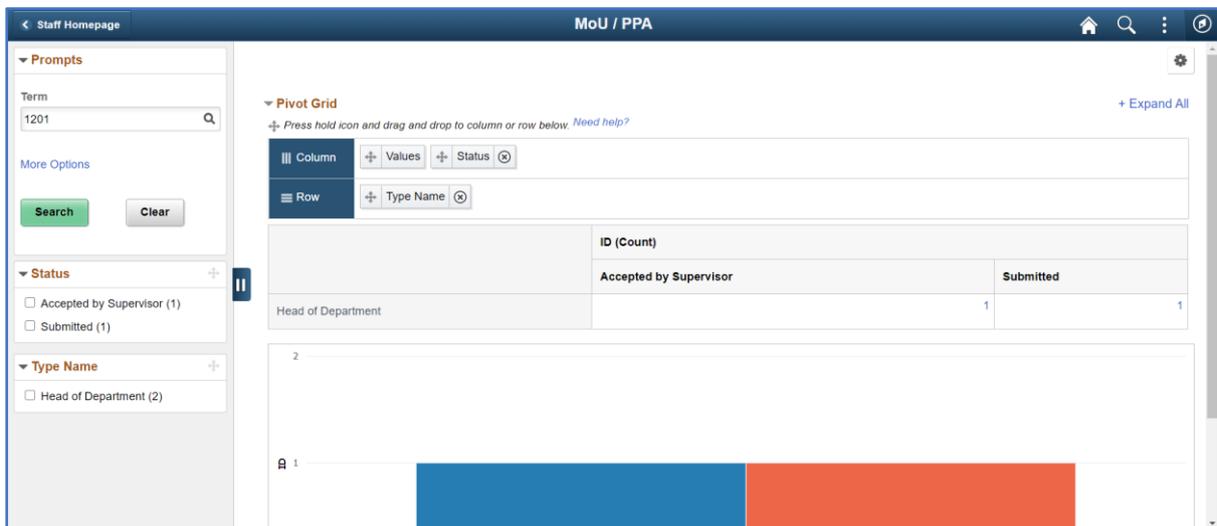
Lesson 9: HOD Viewing the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form

To view the student record of the post-graduate students which requires your approval, use the following actions:

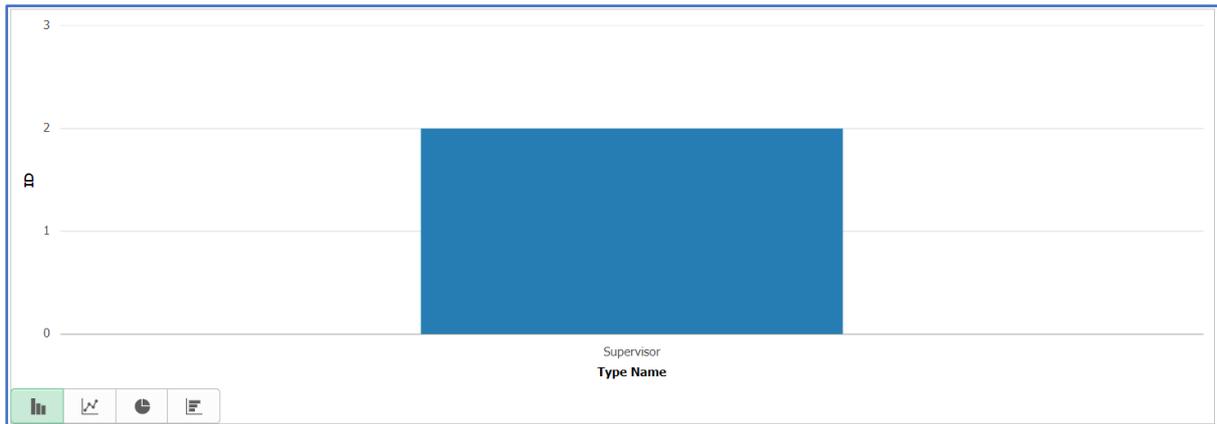
Note All post-graduate students who have submitted MoU or PPA forms will appear on the MoU and PPA tile



- Click on the **Accepted by Supervisor** bar in the **MoU/PPA** tile



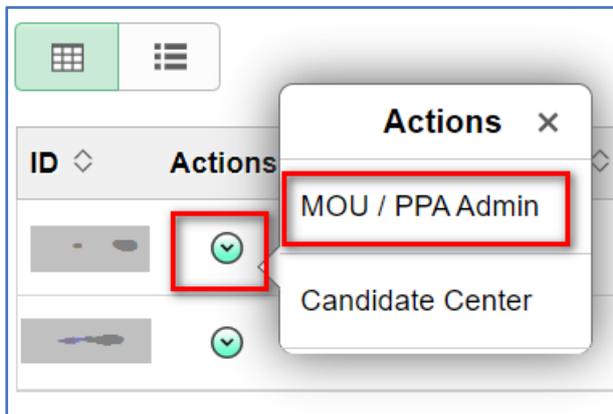
- The **Pivot Grid** screen will appear



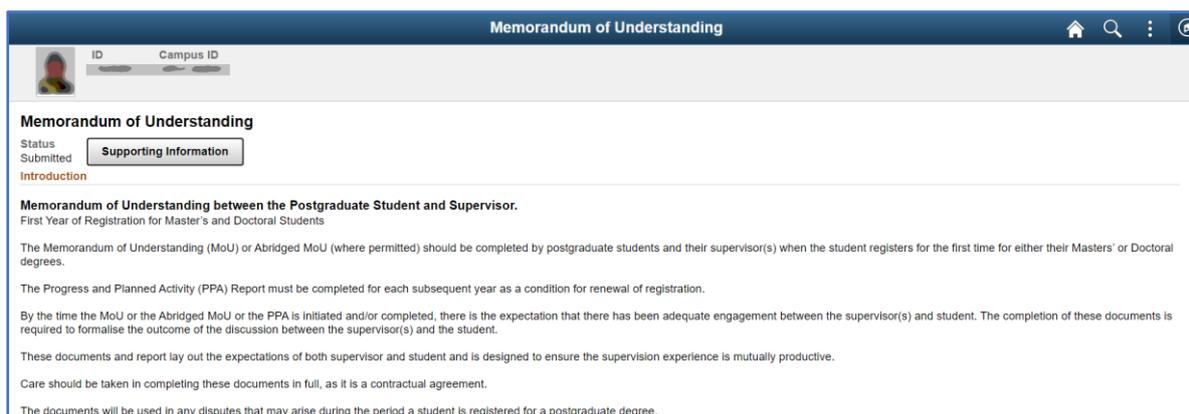
- Click on the **Accepted by Supervisor bar**

ID	Actions	Institution	Term	Sequence	Type	Can Nbr	Updated	By	Status	Display Name	User	Type Name
		UCT01	1201	1	Progress and Planned Activity	000000084301	2020-10-23-10.36.45.000000		Submitted			Deputy Dean
		UCT01	1201	1	Memorandum of Understanding	000000077355	2020-10-23-10.27.26.000000		Submitted			Deputy Dean

- The **Actions** list will appear.



- Select the **dropdown** menu and the **MOU/PPA Admin Actions** menu will appear
- Click on **MOU/PPA Admin**



- The **Memorandum of Understanding** will appear

Note:

- This is a dynamic form where different fields will be displayed depending on your selected options.
- There is no limit on text input

Candidate Information

First Name	Last Name
<input type="text"/>	<input type="text"/>
Email Address	SA Cellular
<input type="text" value="psoft.test@uct.ac.za"/>	<input type="text"/>
Campus Email	Home (Phone)
<input type="text"/>	<input type="text"/>

- ▶ All Academic Qualifications
- ▶ Qualification Information
- ▶ Thesis Information
- ▶ Supervisor Details
- ▶ Supervisor Expectations and Commitments
- ▶ Expectations and Plans of the Student
- ▶ Funding
- ▶ Authorship, Third party data and Intellectual Property
- ▶ Ethics in Research and Biosafety
- ▶ Agreements
- ▶ History

- Scroll down the page to see all the **information fields**



Memorandum of Understanding
🏠 🔍 ⋮

ID
[REDACTED]

Campus ID
[REDACTED]

▼ **All Academic Qualifications**

Year	Academic Career	Field of Study	
2019	Honours	chemistry	1 row

This is important information for students registering for interdisciplinary degrees

▼ **Qualification Information**

Academic Plan
SM001PHY01 Physics

Candidate Number
[REDACTED]

Faculty
Science

Department
Department of Physics

Is this a jointly awarded or co-badged degree?
No ⓘ

I have checked my Faculty-specific requirements and understand that, for example, the word limit for a Research Masters dissertation maybe 50 000 words or 90 pages.

▼ **Thesis Information**

Provisional thesis/dissertation title or area of study

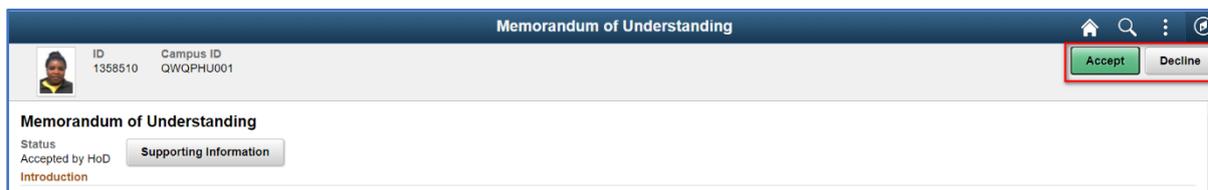
Attached File	Date	View
MoU_Testing.docx	2020-10-23	View

- Check all the **fields** ensuring the correct information has been entered



Lesson 10: HOD Approving or Declining the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form

Once all the information has been verified and checked the Head of Department may accept or decline the MoU or PPA form.



- Click **Decline**

Decline

Action Decline

Comment

This form has been declined due to omissions in the following fields:

Save
Cancel

- Enter a comment in the **Comment** box

After saving, the record will be saved, and notification sent to the student and supervisor that the document has been declined.



- Click **Accept**



Acceptance

Action Accept

Comment

Accepted by the Head of
Department

Save

Cancel

- Enter a comment in the **Comment** box
- Click **Save**

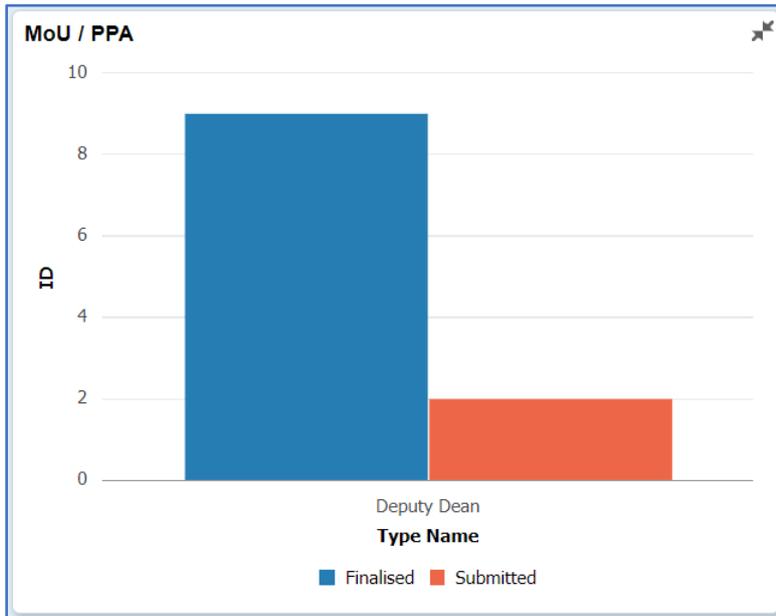
▶ Note After saving, the record will be saved, and email notification sent to the student, Supervisor and Deputy Dean that the document has been accepted and requires verification and approval by the Deputy Dean.



Lesson 11: Deputy Dean Viewing the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form

To view the student record of the post-graduate students which require your Acceptance, use the following actions:

Note All post-graduate students who have been accepted by the HOD will appear on the MoU and PPA Acceptance



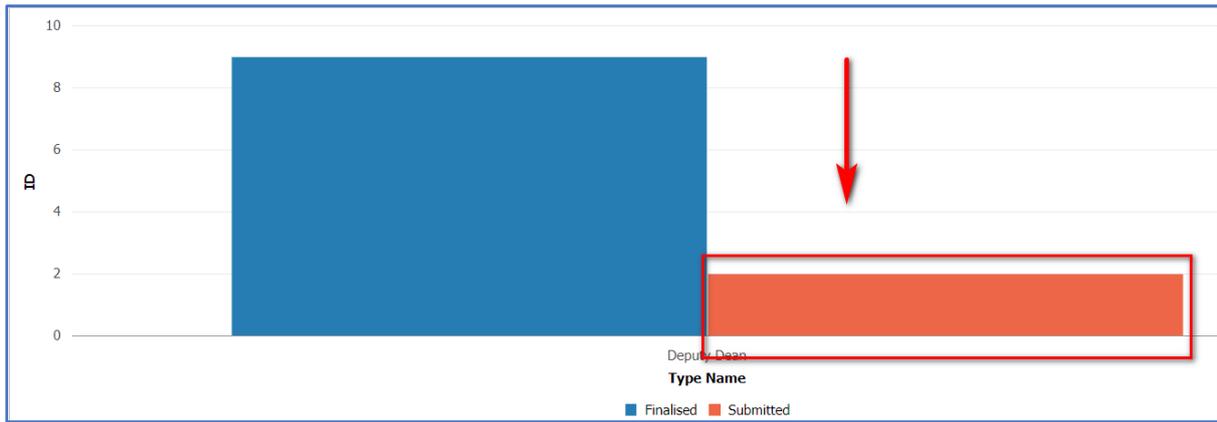
- Click on the **Submitted** bar in the **MoU/PPA** tile

Pivot Grid

Press hold icon and drag and drop to column or row below. [Need help?](#)

	ID (Count)	
	Finalised	Submitted
Deputy Dean	9	2

- The **Pivot Grid** screen will appear

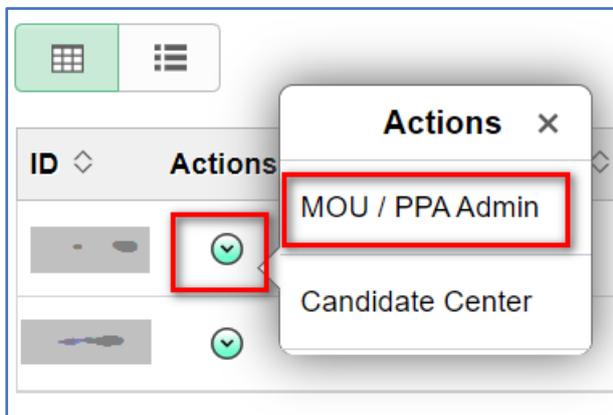


- Click on the **Submitted** bar

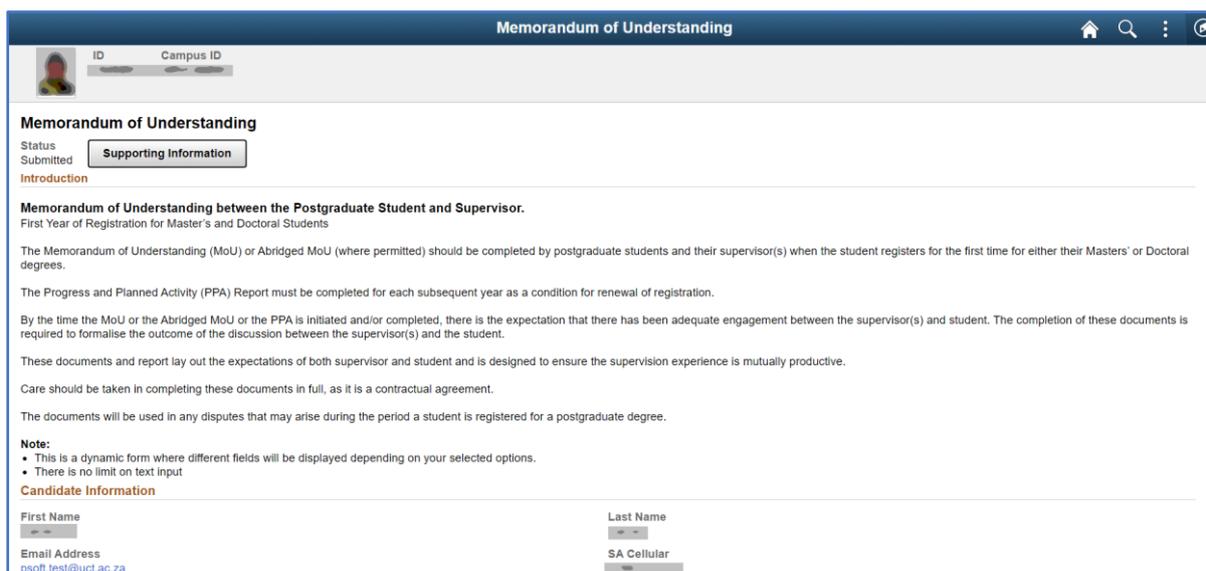
Staff Homepage MoU / PPA

ID	Actions	Institution	Term	Sequence	Type	Can Nbr	Updated	By	Status	Display Name	User	Type Name
		UCT01	1201	1	Progress and Planned Activity	000000084301	2020-10-23-10.36.45.000000		Submitted			Deputy Dean
		UCT01	1201	1	Memorandum of Understanding	000000077355	2020-10-23-10.27.26.000000		Submitted			Deputy Dean

- The **Actions** list will appear.

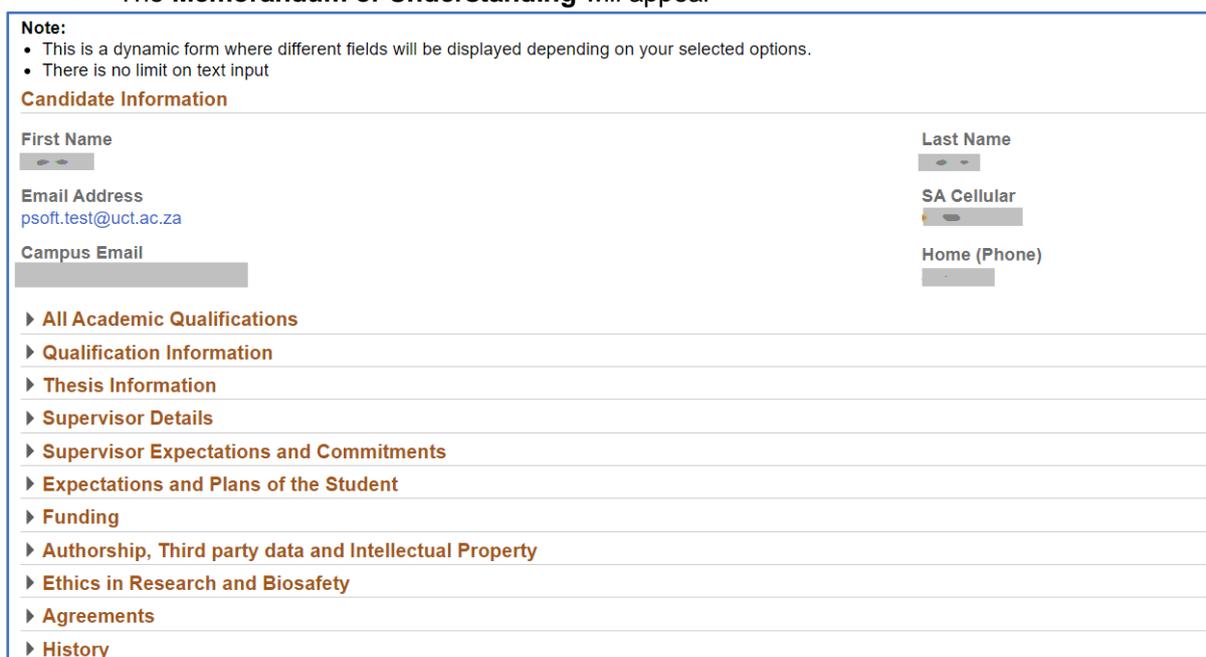


- Select the dropdown menu and the **MOU/PPA Admin Actions** menu will appear
- Click on **MOU/PPA Admin**



The screenshot shows a web browser window titled "Memorandum of Understanding". At the top, there are fields for "ID" and "Campus ID". Below this, the status is "Submitted" and a "Supporting Information" button is visible. The main content area is titled "Memorandum of Understanding" and includes an "Introduction" section. The text explains that the MoU is required for first-year registration and subsequent renewals. It also mentions the Progress and Planned Activity (PPA) Report. A "Note" section states that the form is dynamic and has no text input limit. Below the note is the "Candidate Information" section, which includes input fields for "First Name", "Last Name", "Email Address" (with the example "pssoft.test@uct.ac.za"), and "SA Cellular".

- The **Memorandum of Understanding** will appear



This section provides a detailed view of the "Candidate Information" fields. It includes a "Note" with the same text as in the screenshot above. The "Candidate Information" section contains the following fields:

First Name	Last Name
Email Address pssoft.test@uct.ac.za	SA Cellular
Campus Email	Home (Phone)

Below the input fields is a list of expandable sections:

- ▶ All Academic Qualifications
- ▶ Qualification Information
- ▶ Thesis Information
- ▶ Supervisor Details
- ▶ Supervisor Expectations and Commitments
- ▶ Expectations and Plans of the Student
- ▶ Funding
- ▶ Authorship, Third party data and Intellectual Property
- ▶ Ethics in Research and Biosafety
- ▶ Agreements
- ▶ History

- Scroll down the page to see all the **information fields**



Memorandum of Understanding
🏠 🔍 ⋮

ID
Campus ID

▼ **All Academic Qualifications**

Year	Academic Career	Field of Study	
2019	Honours	chemistry	1 row

This is important information for students registering for interdisciplinary degrees

▼ **Qualification Information**

Academic Plan
SM001PHY01 Physics

Candidate Number

Faculty
Science

Department
Department of Physics

Is this a jointly awarded or co-badged degree?
No ?

I have checked my Faculty-specific requirements and understand that, for example, the word limit for a Research Masters dissertation maybe 50 000 words or 90 pages.

▼ **Thesis Information**

Provisional thesis/dissertation title or area of study

Test data

Attached File	Date	View
MoU_Testing.docx	2020-10-23	View

- Check all the **fields** ensuring the correct information has been entered



Lesson 12: Deputy Dean Approving or Declining the Memorandum of Understanding (MoU) or Progress and Planned Activity (PPA) Form

Once all the information has been verified and checked the Deputy Dean may be accept or decline the MoU or PPA form.



- Click **Decline**

The screenshot shows a modal window titled 'Decline'. At the top, it says 'Action Decline'. Below this is a 'Comment' section with a text input area. The text entered in the comment box is: 'This form has been declined due to omissions in the following fields:'. At the bottom of the modal, there are two buttons: 'Save' (green) and 'Cancel' (grey).

- Enter a comment in the **Comment** box

After saving, the record will be saved, and notification sent to the student, supervisor and Head of Department that the document has been declined.



- Click **Accept**



Acceptance

Action Accept

Comment

SaveCancel

- Enter a comment in the **Comment** box
- Click **Save**

After saving, the record will be saved, and notification sent to the student, supervisor and Head of Department that the document has been accepted.