



UNIVERSITY OF
CALGARY

Faculty of Graduate Studies (FGS)

Supervisory Renewal

Graduate Program Director Guide

May 15, 2023

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Introduction

About



Under the current [University of Calgary Graduate Student Supervision Policy](#), supervisory privileges are granted for a five-year renewable term. If it has been at least five years since a faculty member's supervisory privileges were renewed or since they were approved for supervisory privileges, they will be required to complete the renewal process.

Graduate Program Directors serve as the first reviewer for each renewal request.

Important Reminders

Direction and guidelines



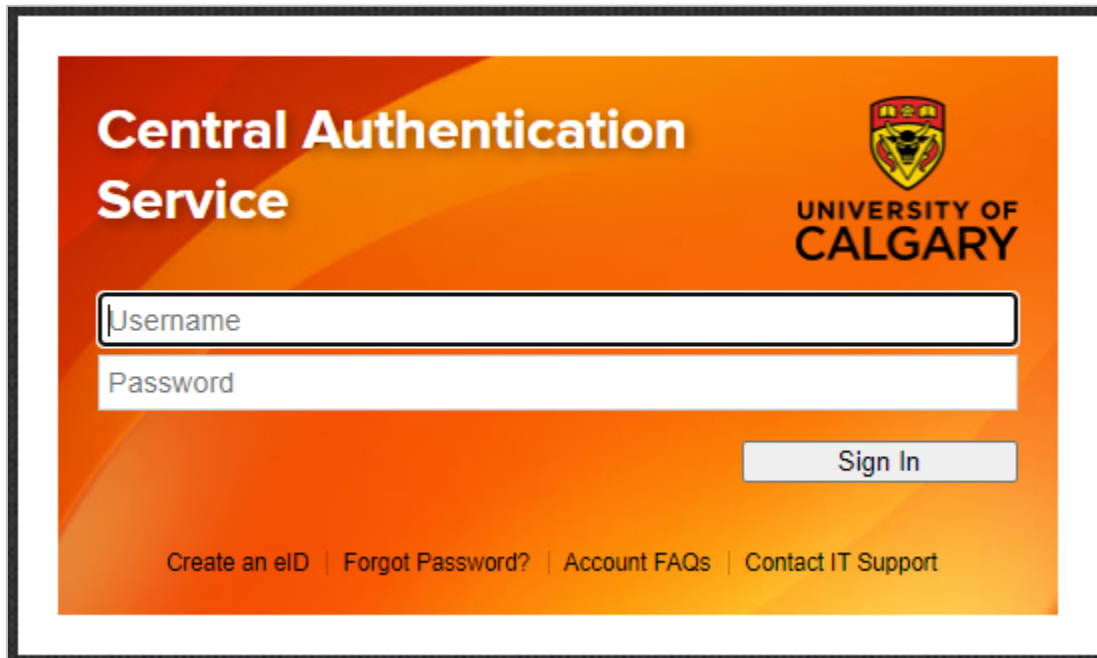
Supervisors may choose if they would like to renew their supervisory privileges, request to change their role, put the renewal process on hold for a year (if currently on an official leave), or not renew their supervisory privileges.

If a supervisor holds supervisory privileges in multiple Graduate Programs, make sure to consult with the GPDs of those programs to confirm the appropriate response for each supervisor. Your recommendation will impact the individual's supervisory privileges for all the programs where they currently hold privileges.

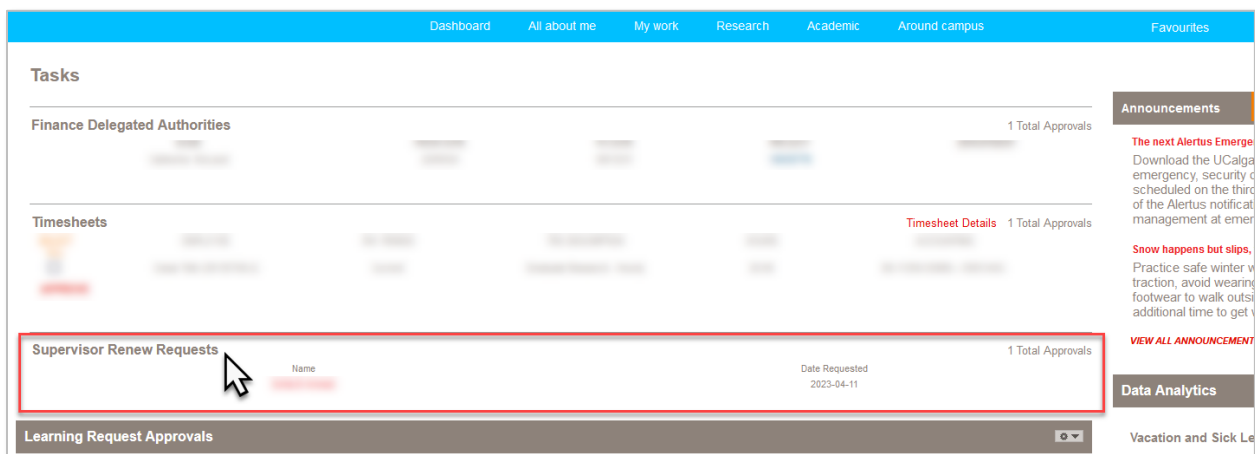
If a supervisor has requested to renew their supervisory privileges and you have concerns regarding their supervisory activities, you have the option to recommend that they undergo a Formal Evaluation of their Supervisory Privileges. The GPD and Administrative Delegate (Department Head/Associate Dean) must agree on a recommendation for renewal or Formal Evaluation. If you are unsure if a Formal Evaluation is necessary, please contact an FGS Associate Dean at adstudents@ucalgary.ca.

Accessing the Supervisory Renewal Webform

1. Log in to the my.ucalgary.ca portal.



2. Scroll down to the **Supervisor Renew Requests** heading in the *Tasks* section.



3. Click on the name of the Supervisor whose request you would like to review.



Reading the Webform

The screenshot shows a webform with several sections:

- Supervisor Details** (Callout 1): Includes fields for ID, Current Role (Supervisor Privileges), and Supervisory Privilege Expiry Date (2021/12/31). A **Supervisory History Report** button is located to the right (Callout 2).
- Associated Areas of Study** (Callout 3): A table with columns for Area of Study, Description, Type, and Category.

Area of Study	Description	Type	Category
MDCV-AOS	Cardiovascular/Respiratory Sci	Other	Unrestricted
MDSC-AOS	Medical Science	Home Department	Unrestricted
- Request Details** (Callout 3): Includes Current Role (Supervisor Privileges), Request Type (Renew), and a checkbox for **Send for Formal Evaluation**.
- Comment History** (Callout 5): A list of comments with a **Supervisor Question?** link (Callout 4) next to the first comment.
- Approver Comments**: A section with a red warning: "Please note that all comments can be read by the supervisor and all parties accessing this webform." Below it is a dropdown menu for comments (Callout 4) and buttons for **Approve** and **PushBack**.

1. The *Supervisor Details* section provides an overview of the supervisor’s supervisory history, including a list of all programs where they currently hold supervisory privileges.
2. Click the **Supervisory History Report** button to open a PDF of the supervisor’s current and previous students. Make sure that pop-ups are enabled to view the Supervisory History Report.
3. In the *Request Details* section, the **Request Type** line shows the supervisor’s desired outcome for the renewal process.
4. If the supervisor has indicated that they would like to renew their supervisory privileges, the *Comment History* box includes their answers to three questions related to their supervisory history and approach to supervision.
5. You can view these questions by clicking the **Supervisor Question** link.

Reviewing a Request to Renew

1. Review the answers that the supervisor provided in the *Comment History* box. If a supervisor is resubmitting the request with additional information, their updated responses will be at the bottom of the *Comment History* box.
2. If the supervisor holds supervisory privileges in multiple Graduate Programs, please consult with the Graduate Program Directors for those programs.
3. If you feel it would be beneficial, you may choose to arrange a meeting with the supervisor as well.



If you are considering recommending that a supervisor go through the Formal Evaluation process, you can find more information about what that process will look like and what patterns might prompt a recommendation for Formal Evaluation [here](#).

Requesting More Information

1. If, after reviewing the supervisor's answers, you feel that you require more information from the supervisor, select **Additional Info is Required** from the *Approver Comments* dropdown menu. The Approver Comments do not allow you to provide any additional details about the information that is required, so you may need to follow up with a clarification email specifying what you are looking for.

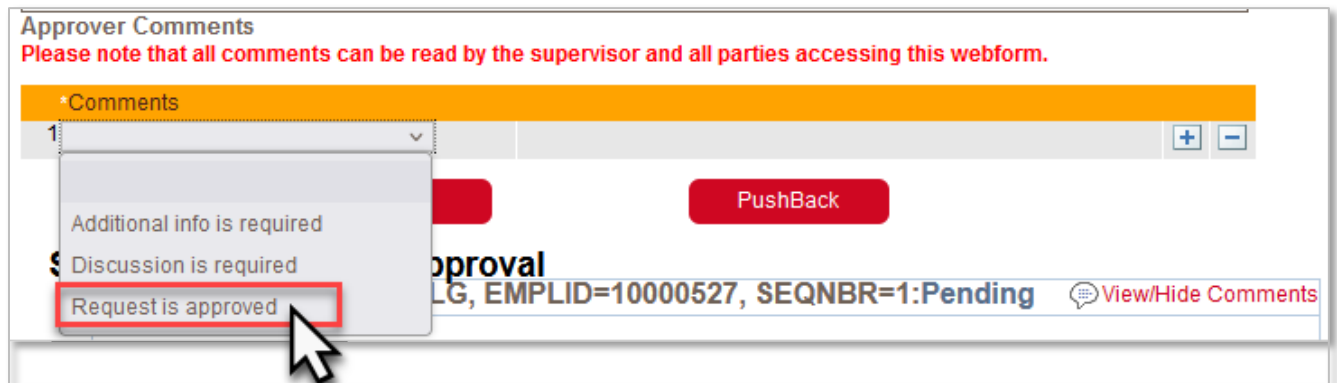
The screenshot shows the 'Approver Comments' section of a webform. At the top, it says 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a dropdown menu labeled 'Comments' with a list of three options: 'Additional info is required', 'Discussion is required', and 'Request is approved'. A mouse cursor is pointing at the 'Additional info is required' option. To the right of the dropdown is a red 'PushBack' button. Below the dropdown, the text 'Approval' is partially visible, along with 'LG, EMPLID=10000527, SEQNBR=1:Pending' and a 'View/Hide Comments' link.

2. Click the **PushBack** button.

The screenshot shows the 'Approver Comments' section after the 'Additional info is required' option has been selected. The dropdown menu now displays 'Additional info is required' and the text 'Please provide a more detailed response to the questions.' is visible. Below the dropdown are two red buttons: 'Approve' and 'PushBack'. A mouse cursor is pointing at the 'PushBack' button.

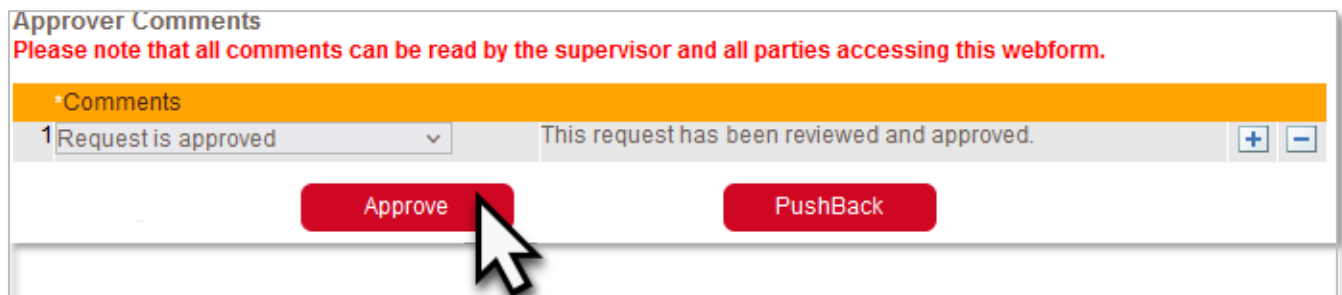
Recommending Renewal

1. If you have no concerns regarding the supervisor and would like to recommend that their supervisory privileges be renewed for a 5-year term, select **Request is Approved** from the *Approver Comments* dropdown menu.



The screenshot shows the 'Approver Comments' section of a webform. A dropdown menu is open, displaying three options: 'Additional info is required', 'Discussion is required', and 'Request is approved'. The 'Request is approved' option is highlighted with a red box and a mouse cursor. The background shows a 'PushBack' button and a status bar with the text 'Approval' and 'LG, EMPLID=10000527, SEQNBR=1:Pending'.

2. Click **Approve** to move the webform to the next person in the Approval sequence.

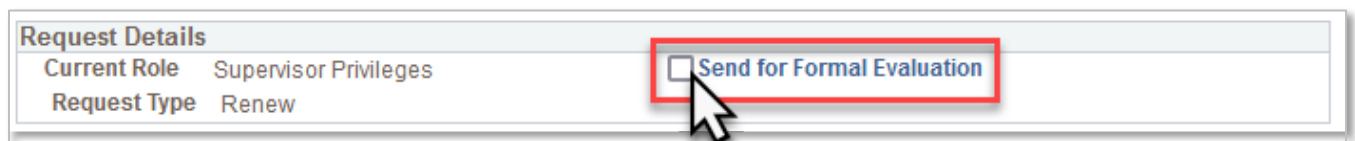


The screenshot shows the 'Approver Comments' section after the dropdown menu has been closed. The dropdown now displays 'Request is approved' and the text 'This request has been reviewed and approved.' is visible. The 'Approve' button is highlighted with a red box and a mouse cursor. The 'PushBack' button is also visible.

After you approve a renewal request, it will go next to your Administrative Delegate (either Department Head or Associate Dean) for approval, followed by the Dean of the Faculty of Graduate Studies.

Recommending Formal Evaluation

1. If you have concerns regarding the supervisor and would like them to go through a Formal Evaluation process before a decision is made on their supervisory privileges, check the *Send for Formal Evaluation* checkbox. If you have concerns regarding a supervisor, but are unsure if a Formal Evaluation is necessary, please reach out to an FGS Associate Dean at adstudents@ucalgary.ca.



The screenshot shows the 'Request Details' section of a webform. The 'Send for Formal Evaluation' checkbox is highlighted with a red box and a mouse cursor. The details include 'Current Role: Supervisor Privileges' and 'Request Type: Renew'.

2. Select **Discussion is required** from the *Approver Comments* drop down menu.

Approver Comments
Please note that all comments can be read by the supervisor and all parties accessing this webform.

*Comments

1 [Discussion is required] Further discussion is required before proceeding. [PushBack] [View/Hide Comments]

3. Click the **Send for Formal Evaluation** button.

Request Details
Current Role Supervisor Privileges Send for Formal Evaluation
Request Type Renew

Comment History Supervisor Question?
2023-04-11 14:35:32 Added by [redacted] I. In the past 5 years, I have
2. I have served as the primary supervisor for
3. My approach to graduate supervision

Approver Comments
Please note that all comments can be read by the supervisor and all parties accessing this webform.

*Comments

1 [Discussion is required] Further discussion is required before proceeding. [Send for Formal Evaluation] [PushBack]

4. You will receive a pop-up message asking you to confirm that you would like to initiate a formal evaluation of supervisory privileges for the supervisor. Click the **Yes** button to confirm.

Message

Click YES to proceed with a formal evaluation or else click NO. (25852,58)

You have chosen to initiate a formal evaluation of supervisory privileges for this supervisor, indicating you have concerns about the supervisory record. This action will pause the supervisory renewal process while a formal evaluation takes place.

Click YES to proceed with a formal evaluation. If you do not wish to proceed with formal evaluation, click NO to return to the supervisory renewal screen and uncheck the formal evaluation box.

[Yes] [No]

After you initiate a request for formal evaluation, it will go next to your Administrative Delegate (either Department Head or Associate Dean) for confirmation. If your Administrative Delegate approves, an FGS Associate Dean will be notified and will follow up with you about next steps. The renewal request in PeopleSoft will remain dormant until the outcome of the formal evaluation is determined.

Reviewing a Request to Change Role

Change to Non-Board Appointed Supervisor

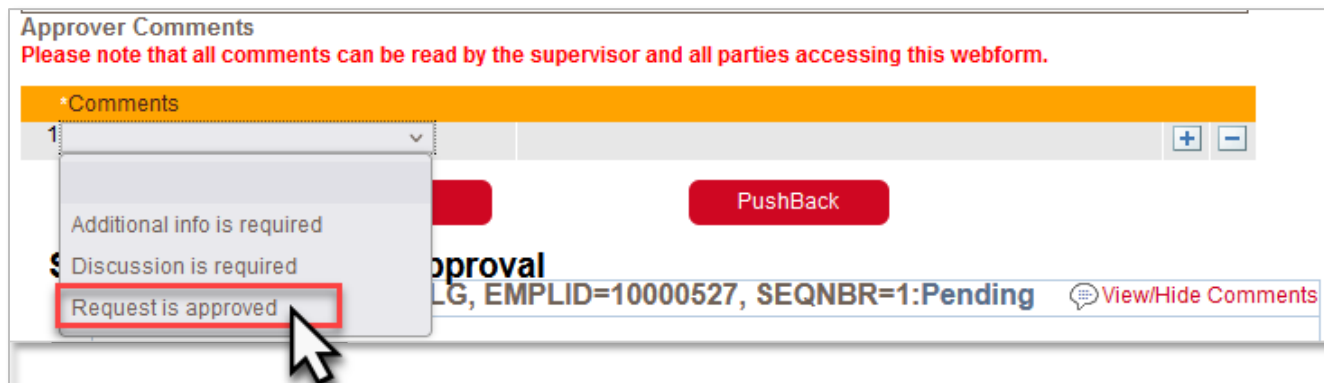


To be eligible to change to the Non-Board Appointed Supervisor role, all the supervisor's students must have a co-supervisor who holds a continuing board appointment at the University of Calgary. If a supervisor has left the University of Calgary or transitioned to solely an Adjunct position, the Non-Board Appointed Supervisor role is the most appropriate option. It is recommended that a discussion between the supervisor and GPD take place before submitting a request to make this change.

1. Review the rationale that the supervisor provided in the *Comment History* box. If a supervisor is resubmitting the request with additional information, their updated responses will be at the bottom of the *Comment History* box.
2. If the supervisor holds supervisory privileges in multiple Graduate Programs, please consult with the Graduate Program Directors for those programs.
3. If you feel it would be beneficial, you may choose to arrange a meeting with the supervisor as well.

Request Approved

1. If you feel that the Non-Board Appointed Supervisor role is appropriate for the supervisor, select **Request is Approved** from the *Approver Comments* dropdown menu.



The screenshot shows a webform interface for 'Approver Comments'. At the top, it says 'Approver Comments' and a red warning: 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a table with one row containing a dropdown menu. The dropdown menu is open, showing three options: 'Additional info is required', 'Discussion is required', and 'Request is approved'. The 'Request is approved' option is highlighted with a red box and a mouse cursor. To the right of the dropdown is a red 'PushBack' button. Below the table, the text 'Approval' is visible, followed by 'LG, EMPLID=10000527, SEQNBR=1:Pending' and a 'View/Hide Comments' link.

2. Click **Approve** to move forward with the change of role. The webform will flow to the Faculty of Graduate Studies for processing.

Approver Comments
Please note that all comments can be read by the supervisor and all parties accessing this webform.

*Comments

1 Request is approved This request has been reviewed and approved. + -

Approve PushBack

Request not Approved

1. If, after reviewing the supervisor’s supervisory history, you feel that the Non-Board Appointed Supervisor role is not appropriate for their current situation, select **Discussion is Required** from the *Approver Comments* dropdown menu. The Approver Comments do not allow you to provide any additional details about the information that is required, so you may need to follow up with a clarification email specifying what you are looking for.

Approver Comments
Please note that all comments can be read by the supervisor and all parties accessing this webform.

*Comments

1 Additional info is required Discussion is required Request is approved + -

PushBack

approval
LG, EMPLID=10000527, SEQNBR=1:Pending View/Hide Comments

2. Click the **PushBack** button.

Approver Comments
Please note that all comments can be read by the supervisor and all parties accessing this webform.

*Comments

1 Discussion is required Further discussion is required before proceeding. + -

Approve PushBack

Change to Committee Member/Examiner



To be eligible to change to the Committee Member/Examiner role, a supervisor cannot be currently serving as a supervisor for any students. It is recommended that a discussion between the supervisor and GPD take place before submitting a request to make this change. If the request is approved, the supervisor will need to undergo the process of being recommended for supervisory privileges again if they would like to return to supervising students.

1. Review the rationale that the supervisor provided in the *Comment History* box. If a supervisor is resubmitting the request with additional information, their updated responses will be at the bottom of the *Comment History* box.
2. If the supervisor holds supervisory privileges in multiple Graduate Programs, consult with the Graduate Program Directors for those programs.
3. If you feel it would be beneficial, you may choose to arrange a meeting with the supervisor as well.

Request Approved

1. If you feel that the Committee Member/Examiner role is appropriate for the supervisor, select **Request is Approved** from the *Approver Comments* dropdown menu.

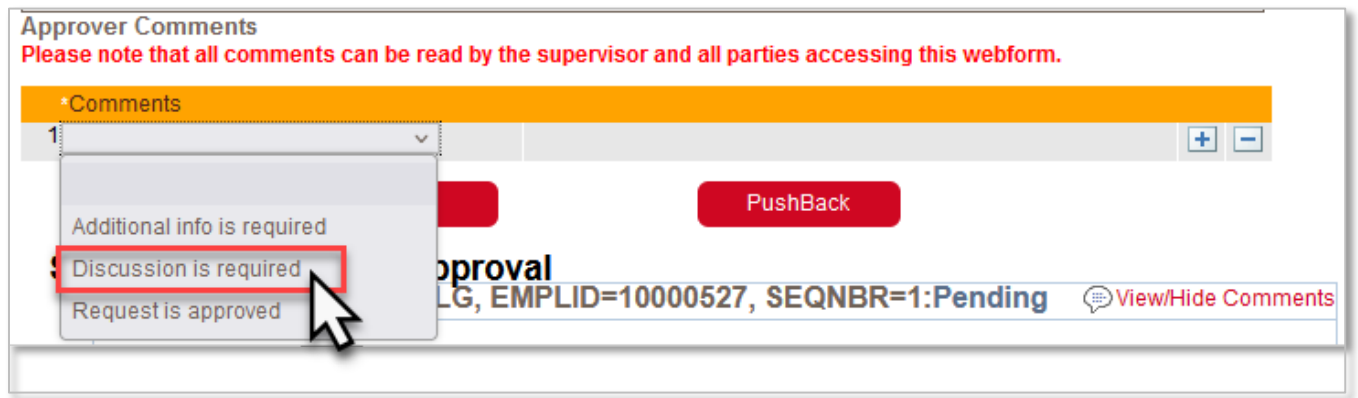
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2. Click **Approve** to move forward with the change of role. The webform will flow to the Faculty of Graduate Studies for processing.

The screenshot shows the 'Approver Comments' section after the 'Request is approved' option has been selected. The dropdown menu now displays 'Request is approved'. To the right of the dropdown, the text 'This request has been reviewed and approved.' is visible. Below the dropdown are two red buttons: 'Approve' and 'PushBack'. A mouse cursor is pointing at the 'Approve' button.

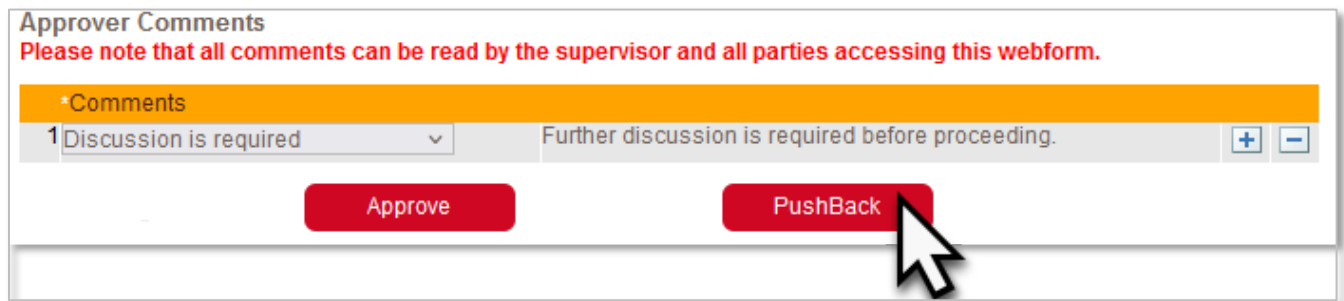
Request not Approved

1. If, after reviewing the supervisor's supervisory history, you feel that the Committee Member/Examiner role is not appropriate for their current situation, select **Discussion is Required** from the *Approver Comments* dropdown menu. The Approver Comments do not allow you to provide any additional details about the information that is required, so you may need to follow up with a clarification email specifying what you are looking for.



The screenshot shows the 'Approver Comments' section of a webform. At the top, it says 'Approver Comments' and 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a yellow bar with the word 'Comments'. A dropdown menu is open, showing three options: 'Additional info is required', 'Discussion is required' (which is highlighted with a red box and a mouse cursor), and 'Request is approved'. To the right of the dropdown is a red 'PushBack' button. Below the dropdown, the text 'Approval' and 'LG, EMPLID=10000527, SEQNBR=1:Pending' is visible, along with a 'View/Hide Comments' link.

2. Click the **PushBack** button.



The screenshot shows the 'Approver Comments' section after the dropdown menu has been closed. The dropdown now displays 'Discussion is required' and the text 'Further discussion is required before proceeding.' is visible. Below the dropdown are two red buttons: 'Approve' and 'PushBack'. A mouse cursor is pointing at the 'PushBack' button.

Reviewing a Request to Put the Renewal on Hold



Supervisors who are on an approved leave from the University have the option to delay the supervisory renewal process until their leave ends.

Ensure that a [Proposed Arrangements for Graduate Student Supervision During Leave form](#) is completed for all supervisors who are on leave from the University.

Request Approved

1. Verify that the supervisor is currently on leave.
2. Select **Request is Approved** from the *Approver Comments* dropdown menu.

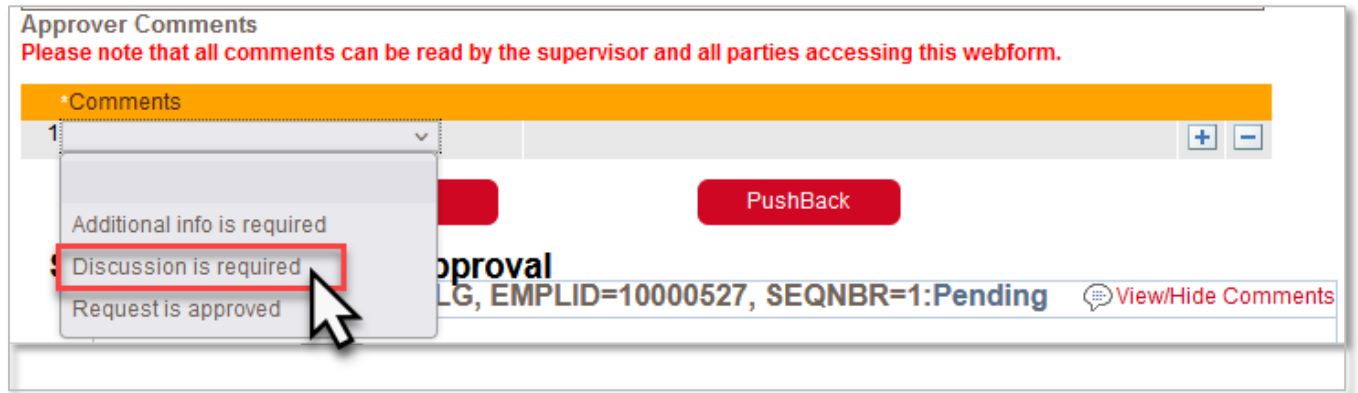
The screenshot shows the 'Approver Comments' section of a webform. At the top, it says 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a dropdown menu with the following options: 'Additional info is required', 'Discussion is required', and 'Request is approved'. The 'Request is approved' option is highlighted with a red box and a mouse cursor. To the right of the dropdown is a 'PushBack' button. Below the dropdown, the text 'Approval' is visible, followed by 'LG, EMPLID=10000527, SEQNBR=1:Pending' and a 'View/Hide Comments' link.

3. Click **Approve** to finalize the postponement of the renewal process by one year.

The screenshot shows the 'Approver Comments' section of a webform. At the top, it says 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a dropdown menu with the text 'Request is approved' and a mouse cursor pointing to it. To the right of the dropdown is the text 'This request has been reviewed and approved.' Below this is an 'Approve' button and a 'PushBack' button.

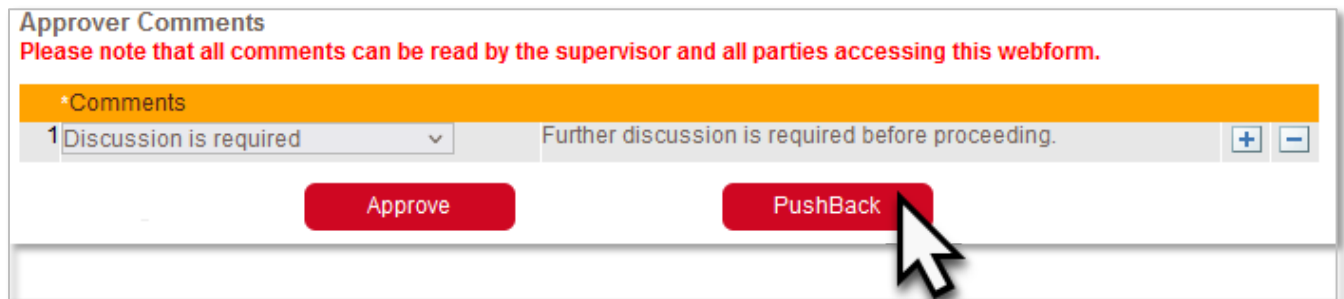
Request not Approved

1. If you determine that the supervisor is not currently on an approved leave, select **Discussion is required** from the *Approver Comments* dropdown menu. The Approver Comments do not allow you to provide any additional details about the information that is required, so you may need to follow up with a clarification email specifying what you are looking for.



The screenshot shows the 'Approver Comments' section of a webform. At the top, it says 'Approver Comments' and 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a dropdown menu labeled 'Comments' with a plus and minus icon. The dropdown menu is open, showing three options: 'Additional info is required', 'Discussion is required' (which is highlighted with a red box and a mouse cursor), and 'Request is approved'. To the right of the dropdown menu is a red 'PushBack' button. Below the dropdown menu, the text 'Approval' is visible, followed by 'LG, EMPLID=10000527, SEQNBR=1:Pending' and a 'View/Hide Comments' link.

2. Click the **PushBack** button.



The screenshot shows the 'Approver Comments' section of a webform. At the top, it says 'Approver Comments' and 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a dropdown menu labeled 'Comments' with a plus and minus icon. The dropdown menu is open, showing three options: 'Additional info is required', 'Discussion is required', and 'Request is approved'. The text 'Discussion is required' is visible in the dropdown menu. To the right of the dropdown menu is a red 'PushBack' button, which is highlighted with a mouse cursor. Below the dropdown menu, the text 'Further discussion is required before proceeding.' is visible. Below the text are two red buttons: 'Approve' and 'PushBack'.

Reviewing a Request to Not Renew



To be eligible to not renew their supervisory privileges, a supervisor cannot be currently serving as a supervisor for any students. It is recommended that a discussion between the supervisor and GPD take place before submitting a request to make this change. If the request is approved, the supervisor will need to undergo the process of being recommended for supervisory privileges again if they would like to return to supervising students.

1. Review the rationale that the supervisor provided in the *Comment History* box or refer back to your previous discussion.
2. If the supervisor holds supervisory privileges in multiple Graduate Programs, consult with the Graduate Program Directors for those programs.
3. If you feel it would be beneficial, you may choose to arrange a meeting with the supervisor as well.

Request Approved

1. If you feel it is appropriate for this supervisor to no longer hold supervisory privileges, select **Request is Approved** from the *Approver Comments* dropdown menu.

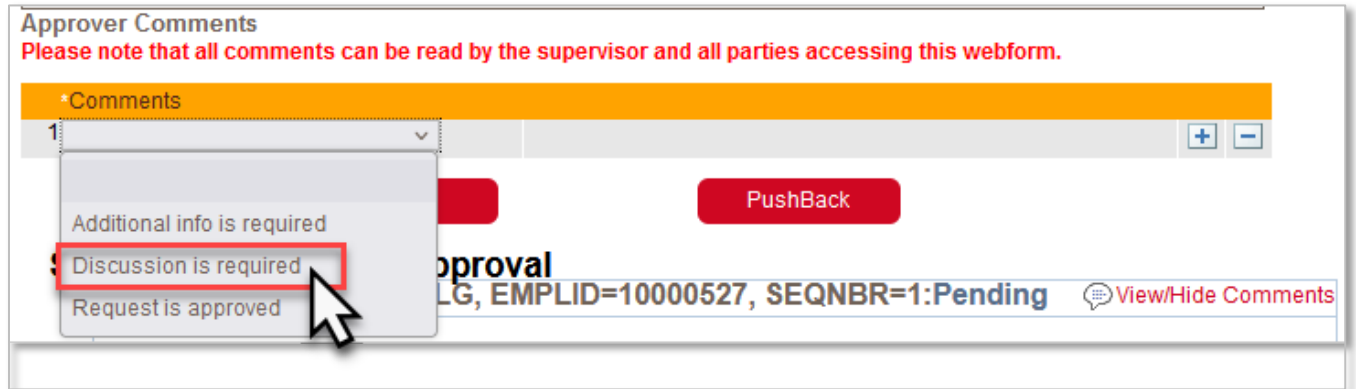
The screenshot shows the 'Approver Comments' section of a webform. At the top, a red warning message reads: 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a dropdown menu labeled '*Comments' with a list of three options: 'Additional info is required', 'Discussion is required', and 'Request is approved'. The 'Request is approved' option is highlighted with a red box, and a mouse cursor is pointing at it. To the right of the dropdown is a red 'PushBack' button. Below the dropdown, a status bar shows 'Approval' and 'LG, EMPLID=10000527, SEQNBR=1:Pending' with a 'View/Hide Comments' link.

2. Click **Approve** to finalize the ending of the individual's supervisory privileges.

The screenshot shows the 'Approver Comments' section after the dropdown menu has been closed. The dropdown now displays '1 Request is approved'. The status bar below shows 'This request has been reviewed and approved.' A red 'Approve' button is highlighted with a mouse cursor, and a red 'PushBack' button is visible to its right.

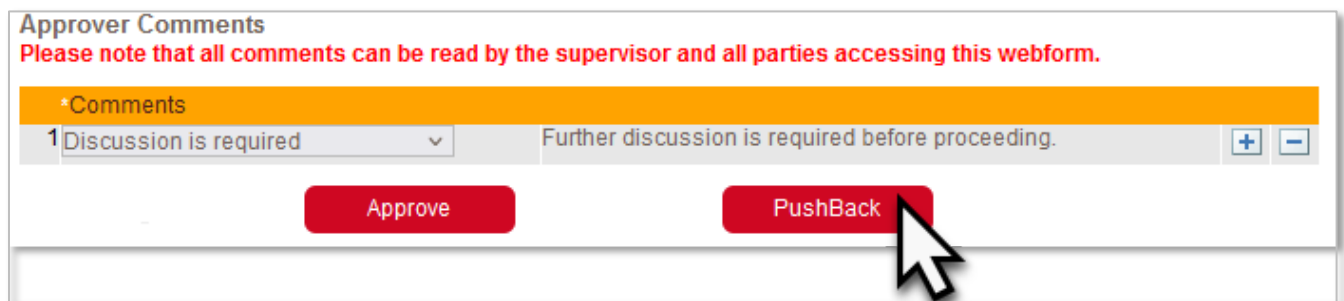
Request not Approved

1. If, after reviewing the supervisor's supervisory history, you feel that the supervisor should continue to hold supervisory privileges, select **Discussion is required** from the *Approver Comments* dropdown menu. The Approver Comments do not allow you to provide any additional details about the information that is required, so you may need to follow up with a clarification email specifying what you are looking for.



The screenshot shows the 'Approver Comments' section of a webform. At the top, it says 'Approver Comments' and 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a table with a header 'Comments' and a row with a dropdown menu. The dropdown menu is open, showing three options: 'Additional info is required', 'Discussion is required' (highlighted with a red box and a mouse cursor), and 'Request is approved'. To the right of the dropdown is a 'PushBack' button. Below the dropdown, the text 'Approval' and 'G, EMPLID=10000527, SEQNBR=1:Pending' is visible, along with a 'View/Hide Comments' link.

2. Click the **PushBack** button.



The screenshot shows the 'Approver Comments' section of a webform. At the top, it says 'Approver Comments' and 'Please note that all comments can be read by the supervisor and all parties accessing this webform.' Below this is a table with a header 'Comments' and a row with a dropdown menu. The dropdown menu is open, showing three options: 'Additional info is required', 'Discussion is required', and 'Request is approved'. The 'Discussion is required' option is selected, and the text 'Further discussion is required before proceeding.' is displayed in the table cell. Below the dropdown is an 'Approve' button and a 'PushBack' button, which is highlighted with a mouse cursor.

When a Supervisor Resubmits



If, at any point in the process, you have clicked PushBack, the supervisor will have an opportunity to either add additional comments or to change their request type.

If the Supervisor has provided additional comments

1. Access the resubmitted form following the [Accessing the Supervisory Renewal Webform](#) instructions.
2. Review the new information that the supervisor has provided. The supervisor's initial comments will remain at the top of the comment history box. Either read through the entire comment history or scroll down to the supervisor's new comment at the end of the comment history. Each comment has a date stamp and specifies who made the comment.

Supervisor Details

ID [redacted] [Supervisory History Report](#)

Current Role Supervisor Privileges Supervisory Privilege Expiry Date 2022/12/31

Associated Areas of Study			
Area of Study	Description	Type	Category
BMEN-AOS	Biomedical Engineering	Other	Masters
MDBC-AOS	Biochemistry & Molecular Biol	Other	Unrestricted
MDSC-AOS	Medical Science	Home Department	Unrestricted

Request Details

Current Role Supervisor Privileges [Send for Formal Evaluation](#)

Request Type Renew

Comment History [Supervisor Questions?](#)

2023-05-09 10:54:27 Added by [redacted]: Please provide a more detailed response to the questions.

2023-05-09 10:58:51 Added by [redacted]: 3) My approach to graduate supervision is customized to the needs to the individual student. Some students work best with a more hands off approach. I still aim to touch base on a regular basis through lab meetings and 1-on-1 meetings at least once a quarter to ensure that the student

Approver Comments

Please note that all comments can be read by the supervisor and all parties accessing this webform.

3. Based on the new information that the supervisor has provided, refer to the appropriate section of this guide for instructions on how to recommend renewal or recommend a Formal Evaluation.

If the Supervisor has changed their request type

1. Access the resubmitted form following the [Accessing the Supervisory Renewal Webform](#) instructions.
2. The new request will not contain any information or comment history from the supervisor's previous request. Refer to the appropriate section of this guide for instructions on how to review their new request type.

Formal Evaluation Process

GPDs, Heads or Associate Deans may recommend that a supervisor undergo formal evaluation as part of the five-year renewal process or at any other time:

- in response to receipt of a written complaint relating to supervision.
- when the Office of Equity, Diversity and Inclusion has determined that a responsible allegation has been made related to graduate supervision and that this allegation is best addressed through a formal evaluation.
- in response to what the Dean of the teaching faculty perceives to be a pattern of serious conflicts or negative outcomes relating to Graduate Student supervision since the most recent renewal of privileges.

It is up to the Dean of the teaching faculty to initiate an evaluation of supervisory privileges. The supervisor undergoing evaluation must be informed by the Dean of the teaching faculty that the process has been initiated. Feedback from current and/or former graduate students, graduate program directors and supervisory committee members is collected as part of the process, and a summary of the information is shared with the supervisor. The document outlining the procedures for a formal evaluation can be found [here](#).

What characteristics might prompt a recommendation for a formal evaluation?

- A pattern of graduate student withdrawals and/or changes in supervision
- A pattern of protracted time to candidacy (beyond the norm in the graduate program and not attributable to specificities of the area of study)
- A pattern of protracted time to completion of program (beyond the norm in the graduate program and not attributable to specificities of the area of study)
- A pattern of serious conflicts with students

If I recommend that a supervisor undergo a formal evaluation as part of the renewal process, what happens next?

- The Supervisory Renewal process in PeopleSoft will remain in Progress, assigned to a representative of the Faculty of Graduate Studies while an offline formal evaluation process takes place. Once the formal evaluation is completed, the Supervisory Renewal form will be updated to reflect the outcome of the evaluation.
- Refer to the Procedure for Formal Evaluation of Graduate Supervisory Privileges [policy](#) for the steps in the Formal Evaluation process