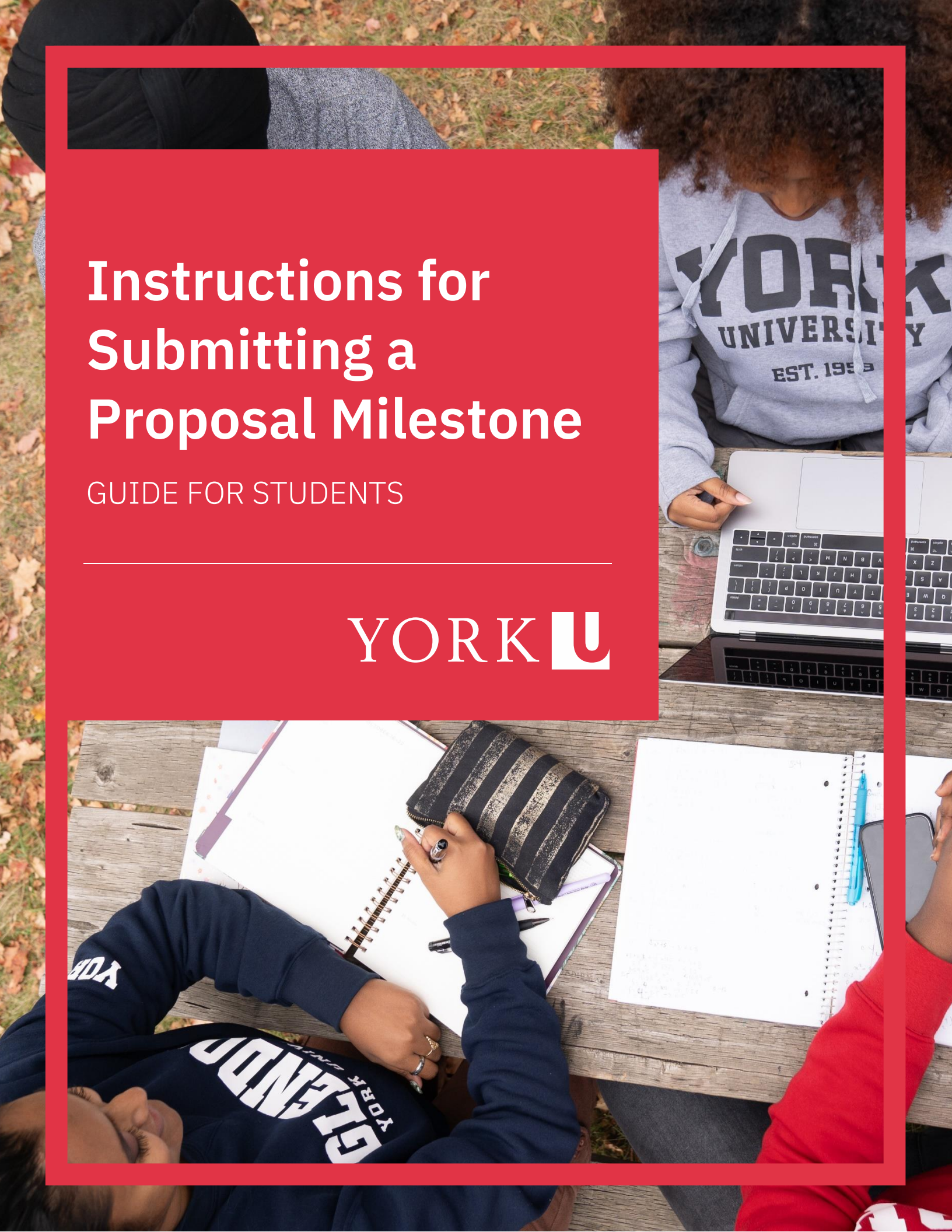


The background of the entire page is a photograph of students sitting at a wooden table outdoors. In the top right, a student with curly hair wears a grey 'YORK UNIVERSITY' sweatshirt and works on a laptop. In the bottom left, a student in a dark blue 'YORK UNIVERSITY' sweatshirt is writing in a spiral notebook. Another student in a red shirt is partially visible on the right. The table is cluttered with notebooks, pens, and a striped pouch. The scene is set on a grassy area with fallen autumn leaves.

Instructions for Submitting a Proposal Milestone

GUIDE FOR STUDENTS

YORK 

Guide for Students: *Instructions for Submitting a Proposal Milestone* (on the Graduate Proposal Milestone Portal)

OFFICE OF THE DEAN (FGS) | NOVEMBER 2024

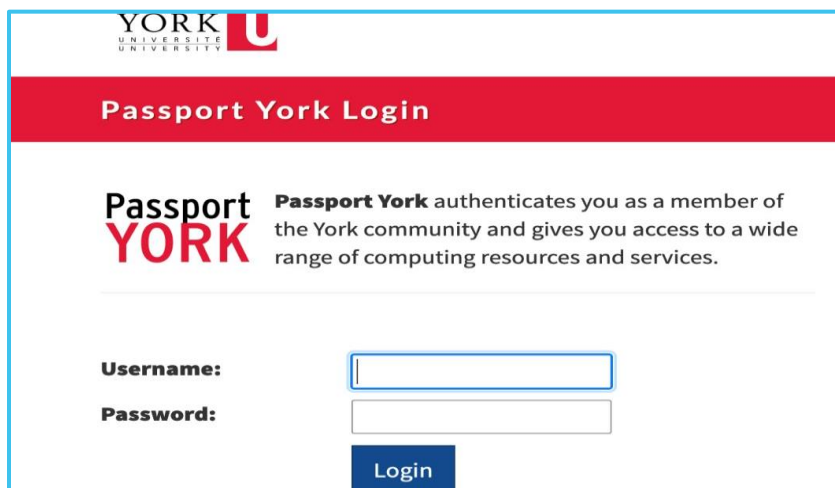
This guide describes the steps that a graduate student will follow to submit a petition on the portal.

*Please consult with your home graduate program office before submitting a petition on the portal.

Entering the Portal

To submit a proposal milestone, enter the Graduate Proposal Milestone Portal via the [Portal Link](#)

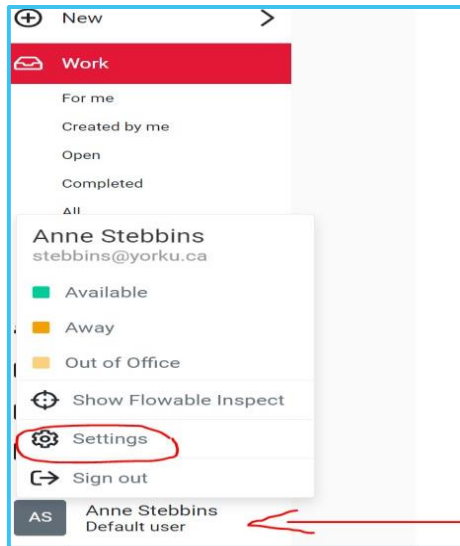
Login to the Graduate Milestone Portal using your student Passport York credentials.



The image above shows the passport Yorku login page

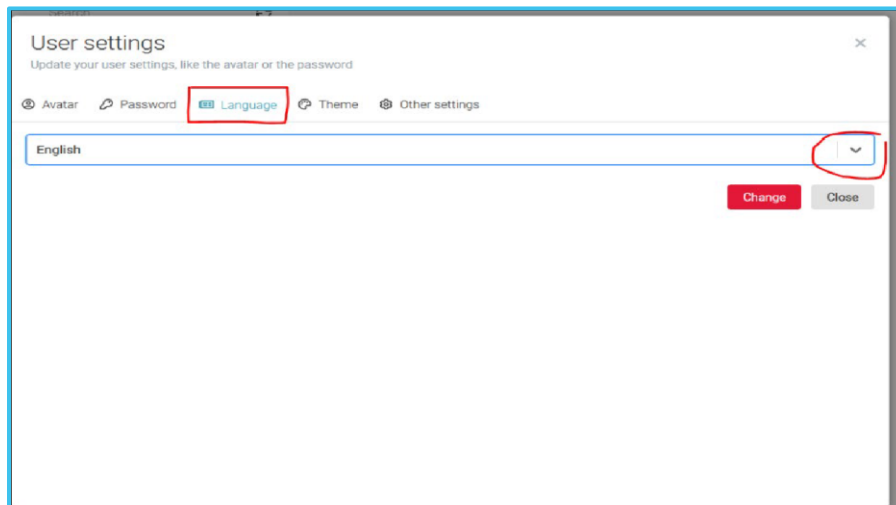
Language Preference

The portal language is English. To set your language preference to *French*, click on your name in the bottom left corner and then click 'settings.' Select *French* from the drop-down menu.



The image above shows the setting gear.

The portal language is set to English. To change to French, select “French” from the drop-down menu.

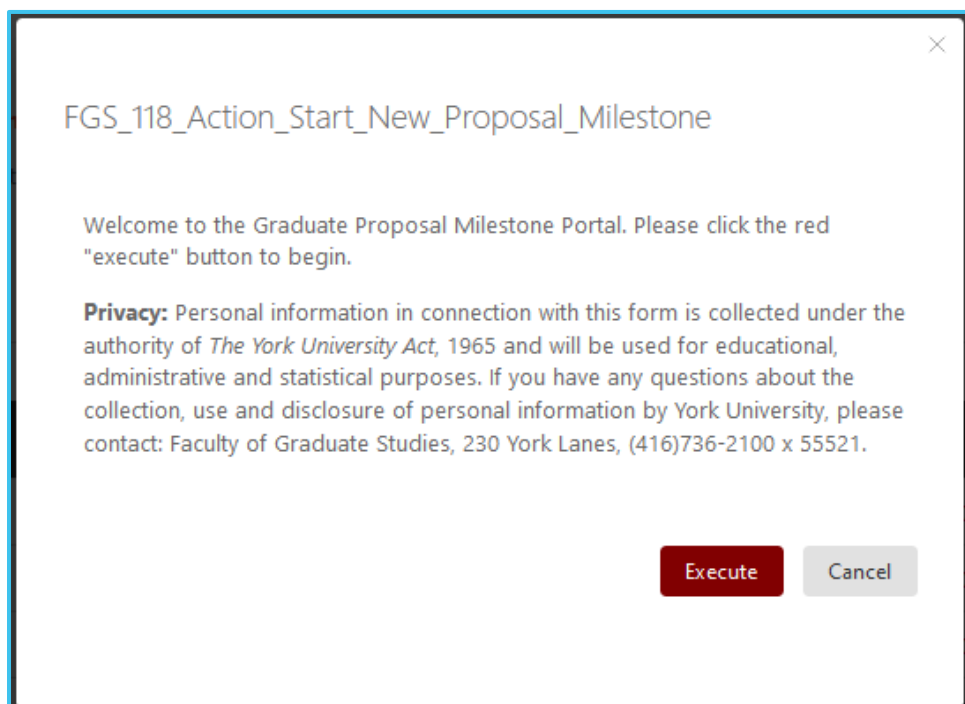


The image above shows the language setting.

How to submit a Proposal Milestone

Click on the ‘Student Dashboard’ on the left-hand side menu.

Click the ‘**Launch a new proposal milestone**’ button. A screen will display privacy information. Click “execute” to launch a new submission.



The image above shows the execute button.

A new proposal milestone will appear in the “proposal milestone in progress” dashboard. Wait a few seconds while it gathers your student information. When it is ready, it will appear under the dashboard **‘My New Proposal Milestone.’** Click on the proposal milestone.

Task Name	Creation Time	Due Date	Id	First Name	Last Name	Student Number
Submit Proposal Milestone	2024/08/09 14:28:40		25185240809022840	EAAStestFN0001	EAAStestLN0001	

The image above shows the My New Proposal Milestones dashboard.

Complete the “student information” tab. The boxes marked with an asterisk (*) are mandatory.

The image shows a web form with two tabs: "STUDENT INFORMATION" (active) and "DOCUMENTS". The "STUDENT INFORMATION" tab contains the following fields:

- Student Number: [Redacted]
- First Name: EAAStestFN0001
- Preferred First Name: [Empty]
- Last Name: EAAStestLN0001
- Email: eaas0001@my.yorku.ca
- Preferred Email: [Empty]
- Program: [Empty]
- Faculty: [Empty]
- Registration Status: [Empty]

The image above shows the student information and documents tabs.

Scroll down and continue to populate all required information. Select the type of research that you would like to submit from the drop-down menu. The type of research selected will inform the type of attachments required in the document tab.

The image shows the "Research Proposal" section of a web form. It includes the following fields and instructions:

- Research Proposal Title: [Empty]
- Research Proposal Type:
 - ☐ Thesis
 - ☐ Dissertation
 - ☐ Pilot Project
- Type of Research:
 - Select a Type of Research [Empty]
 - Research Types [Button]
- Planned Thesis/Dissertation Format: [Empty]

See [Types of Theses/Types of Dissertation](#) section for definitions.

**Note: Students wishing to undertake a thesis/dissertation that does not align with one of the above-mentioned formats are expected to initiate discussions with their supervisory committee and director of the graduate program concerned as early as possible (see Suitability of Proposed Format section at [Master's Thesis](#) or [Doctoral Dissertation](#) for more information).*

Students are responsible for ensuring the final submission of their thesis/dissertation complies with the submission and technical requirements guidelines outlined at [Master's Thesis](#) or [Doctoral Dissertation](#). Please contact your graduate program office for further support.

Risk to Researcher

Are you travelling outside of Canada to conduct this research? *

- ☐ Yes
- ☐ No

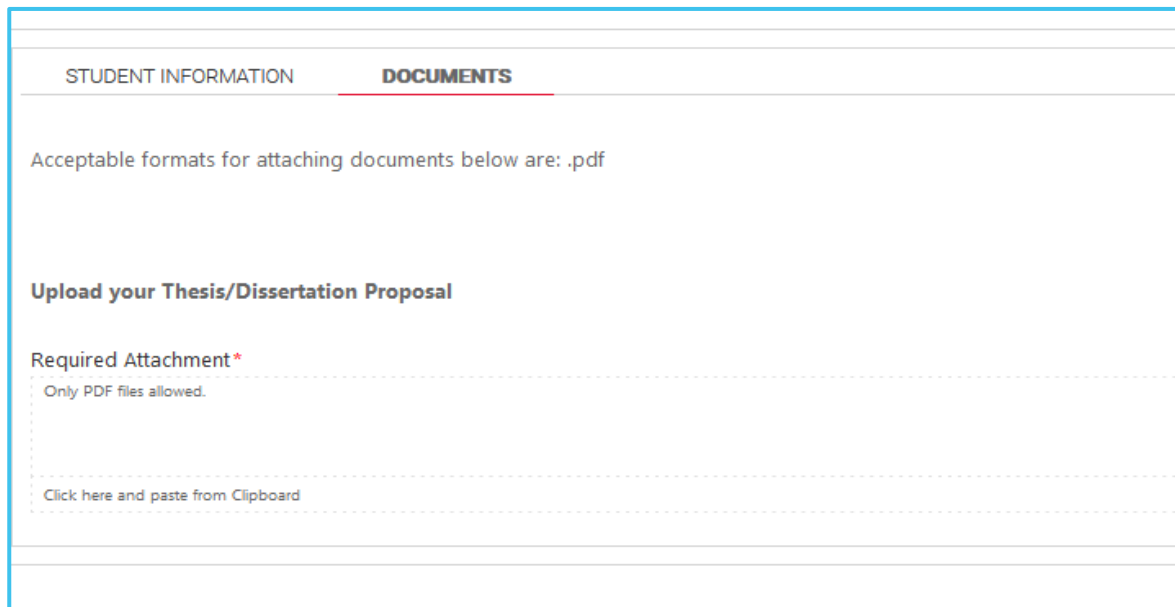
Does the proposed research pose elevated risk to myself as the researcher requiring further health and safety considerations? *

- ☐ Yes
- ☐ No

Please consult the [Graduate Student Risk Assessment Guidelines](#) for information regarding risk assessment and planning.

The image above shows the type of research dropdown menu as well as other fields that are mandatory to complete.

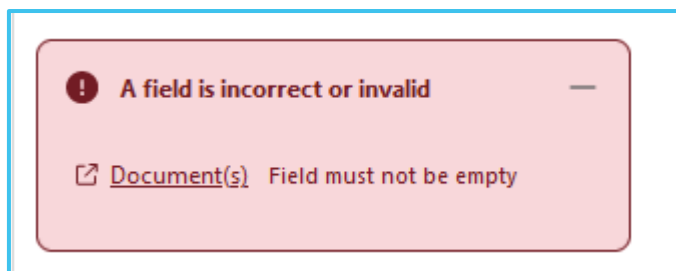
The picture below shows that a thesis/dissertation proposal is a required attachment in the documents tab. It is the only required document because a “Type A- No human participants, no animals, no biohazards, and no secondary data analysis” was selected on the “student information” tab.



The screenshot shows a web interface with two tabs: 'STUDENT INFORMATION' and 'DOCUMENTS'. The 'DOCUMENTS' tab is active. Below the tabs, it states: 'Acceptable formats for attaching documents below are: .pdf'. Underneath, there is a section titled 'Upload your Thesis/Dissertation Proposal'. This section contains a 'Required Attachment*' label, a dashed box with the text 'Only PDF files allowed.', and a link that says 'Click here and paste from Clipboard'.

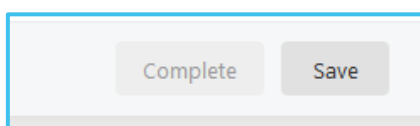
The image above shows the student information and documents tabs.

The grey **‘Complete’** button on the top right will turn red when all required fields are satisfied, and it is possible to submit the proposal milestone. Unsure why you cannot submit? Click the **‘Save’** button to save your work on the submission and continue it later. If something is missing, a red box will appear with information to help guide you to complete the sections that are incomplete. The picture below shows a red box with information about what sections are missing. Click on the underlined list of outstanding items to learn more about what is missing.



The screenshot shows a red error message box with a white exclamation mark icon. The text inside the box reads: 'A field is incorrect or invalid'. Below this, there is a link icon followed by the text 'Document(s) Field must not be empty'.

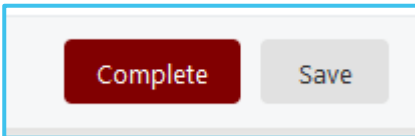
The image above shows the documents field is empty.



The screenshot shows two buttons: 'Complete' and 'Save'. Both buttons are grey and have a slight shadow.

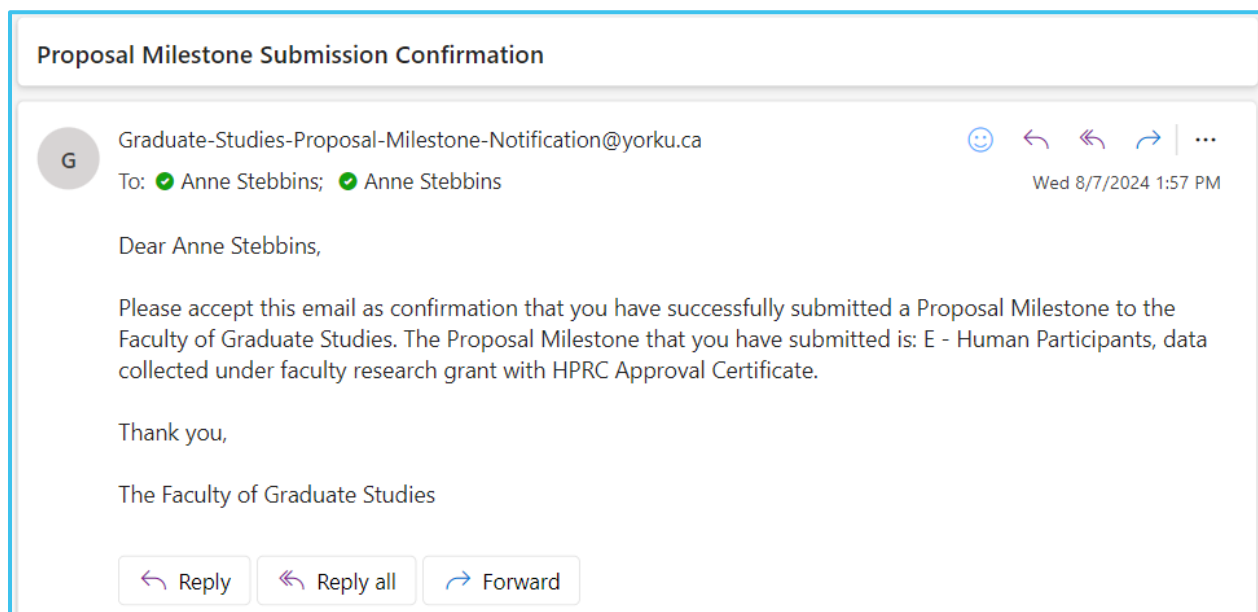
The image above shows that complete button is grey.

When the “complete” button is grey. It is possible to save, but not yet possible to submit the proposal milestone.



The image above shows the red complete button.

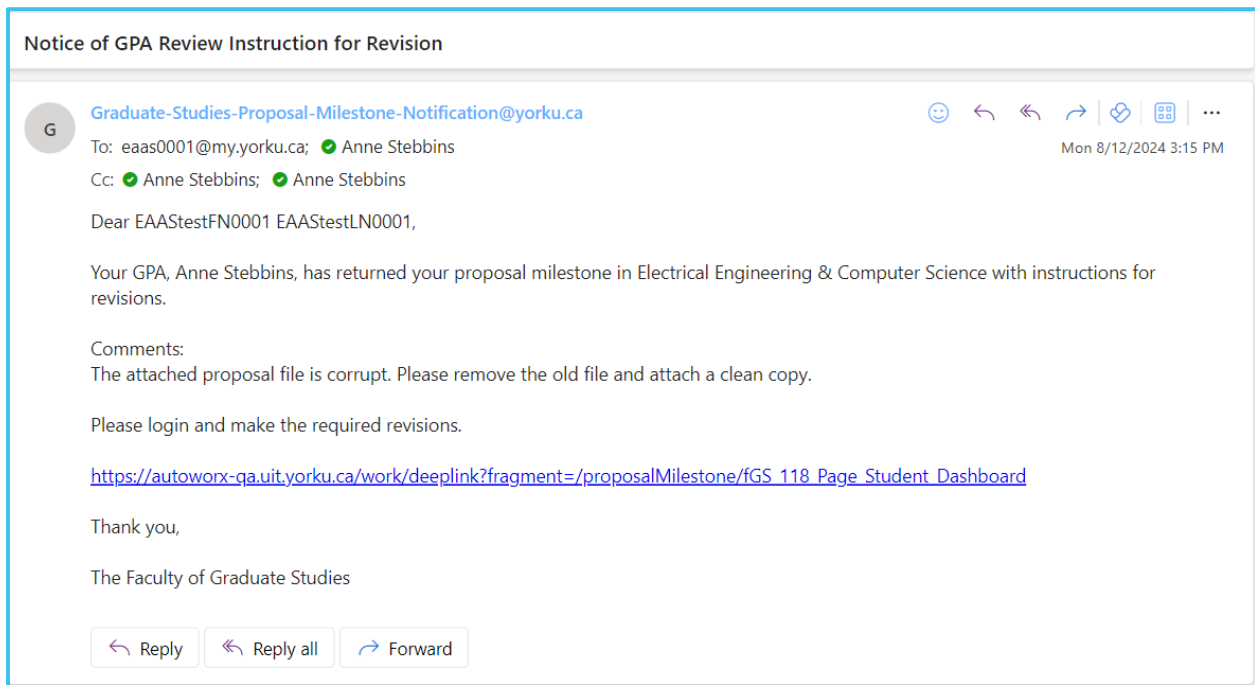
When the “complete” button is red, it is possible to click “complete” to submit the proposal milestone.



The image above shows an example of an email that you will receive an email confirmation once your proposal milestone has been submitted successfully:

You will also receive an email if your proposal milestone is being returned to you.

The picture belows shows an example of an email that contain comments/instructions for revision:



The image above shows an example of an email with comments/instructions for revision.

The returned proposal milestone will appear in the **“My New Proposal Milestones”** dashboard and is coloured red. Click on it.

Task Name	Creation Time	Due Date	Id	First Name	Last Name	Student Number
Submit Proposal Milestone	2024/08/09 15:39:09		25185240808010154	EAASestFN0001	EAASestLN0001	

The image above shows the returned milestone proposal.

The **“instructions”** section at the top of the proposal milestone shows the user identification of the person who sent it back to you, as well as their role. The example in the picture below shows that the Graduate Program Assistant (GPA) sent the proposal back to the student and left an instruction that the proposal file was corrupt. Follow the instructions to revise the proposal milestone and then submit it again by clicking on the **“complete”** button.

Instructions			
Timestamp	User Id	Role	Comments
2024/08/12 15:15:39	stebbins	GPA	The attached proposal file is corrupt. Please remove the old file and attach a clean copy.

The image above shows that the Graduate Program Assistant (GPA) sent the proposal back to the student and left an instruction that the proposal file was corrupt.

Breadcrumb Trail

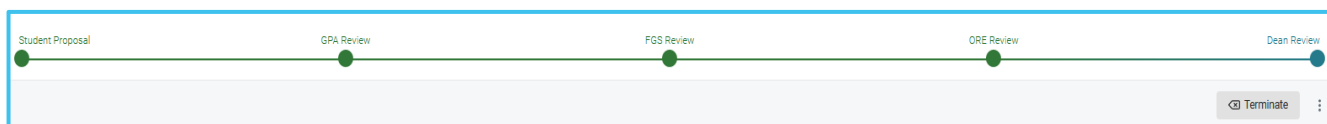
A breadcrumb trail is a visual representation that shows where the proposal milestone is in process. To view the breadcrumb trail, click on the proposal milestone found under the “proposal milestone in progress” dashboard.

Proposal Milestones in Progress						
Id	First Name	Last Name	Student Number	Research Type	Progress Status	Cancel Proposal Milestone
25185240809120109	EAAStetFN0001	EAAStetLN0001		B - Human participants, minimum risk	Your proposal milestone is now being processed	Cancel

The image above shows that the proposal milestone in progress dashboard.

The image below shows a breadcrumb trail for a type B- human participants, minimum risk proposal milestone. It shows that the student has submitted the proposal milestone. It shows that the Graduate Program Assistant (GPA) has reviewed it. It shows that the FGS (Faculty of Graduate Studies) has reviewed it. And it shows that the ORE (Office of Research Ethics) has reviewed it. It shows that the proposal milestone is now sitting at the “Dean Review” stage.

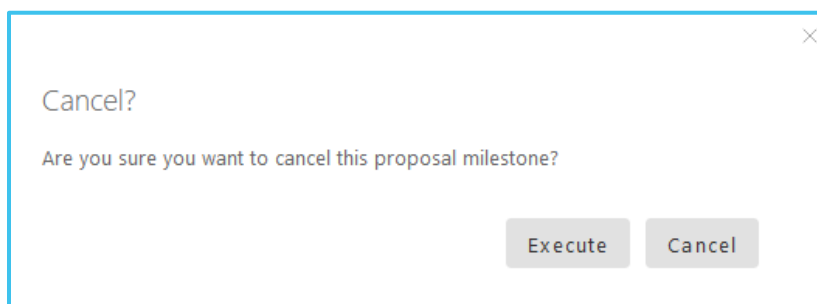
The circles that are coloured green signal that the proposal milestone has passed successfully through that step. The circle that is coloured blue indicates that the proposal milestone is at this step. The blue circle means that this step is currently in progress. The



The image above shows the breadcrumb trail.

Canceling a Proposal Milestone

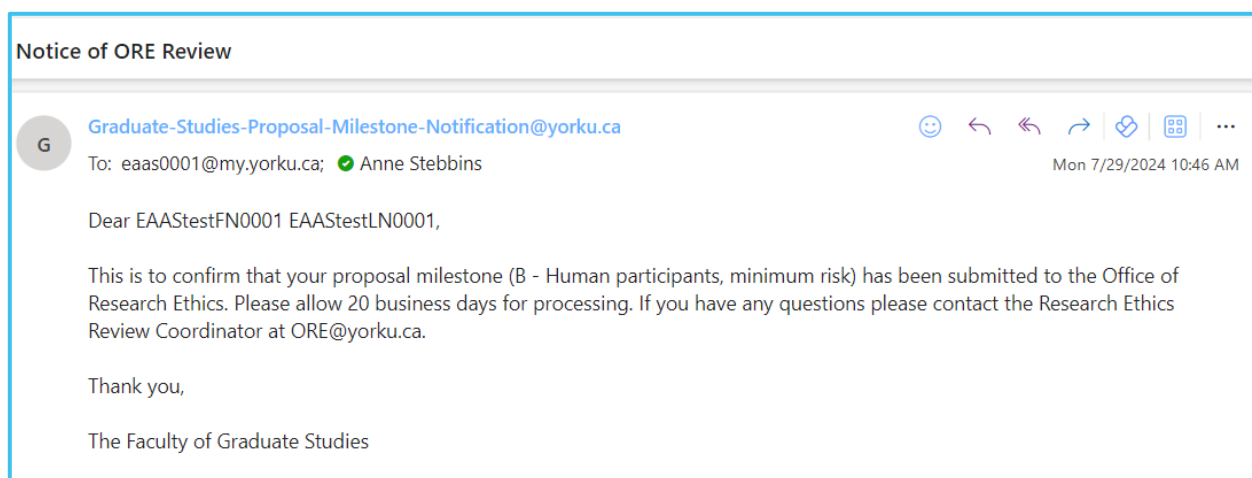
Note that you can cancel your proposal milestone at any time *before* a decision is made. Click on the “cancel button” and press “execute” to confirm the cancellation.



The image above shows that the cancel button has been pressed. Press the execute button to complete the cancellation.

Office of the Research Ethics

Some of the research types require review and approval by the Office of Research Ethics (ORE). You will receive an email notifying you if your package has been sent to the ORE. The picture below shows an email to a student and a Graduate Program Assistant.

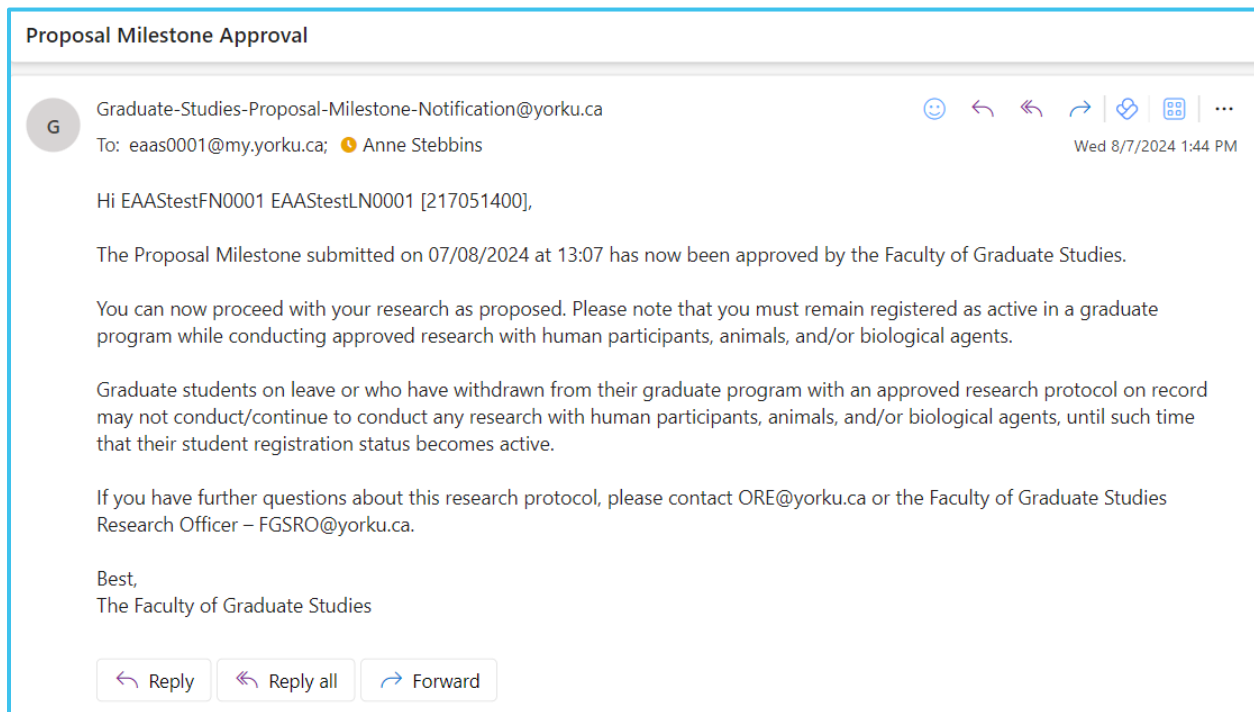


The image above shows an email to a student and a Graduate Program Assistant. The email notifies them that the proposal milestone has been sent to the ORE.

The ORE will send you an email with an attached research certificate when your research ethics package is approved by their office. After that, your research package is returned to FGS so that Associate Dean can review it. You will receive an email once the Dean has approved your proposal. This email confirms that you can now begin your research, and this is the end of the process.

Confirming the Approval of the Proposal Milestone

You will receive an email confirming the approval of the proposal milestone.



The image above is a sample confirmation email.

The approved proposal milestone will appear under the dashboard **‘Completed Proposal Milestones.’**

Completed Proposal Milestones (8)					
Id	First Name	Last Name	Student Number	Research Type	Decision
25185240807115749	EAAStestFN0001	EAAStestLN0001		B - Human participants, minimum risk	approved

The image above shows the completed proposal milestone.