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Major & Annual Review

Outline of Regulatory Aspects of the Process

Richard Mason

Research Degrees, Academic Services

Session Objectives

By the end of this session, you will:

- Have an overview of the Major/Annual Review processes

- Know what sources of guidance are available for the Major/Annual Review processes and where to find them

Useful Contacts

- **Faculty/Department**

  - Departmental Director for Postgraduate Research (DDPGR)
  - Faculty Director for Postgraduate Research (FDPGR)

- **Central**
  - Research Degrees, Student Administration Services, Academic Services

    - Research Degrees Team Ext. 7707
    - **majorreview@port.ac.uk**
    - **annualreview@port.ac.uk**

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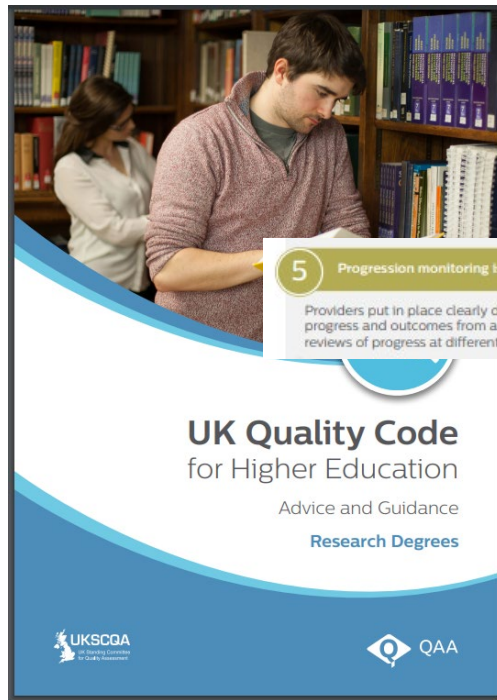
Regulations

PGRS are governed by Regulations

- *Regulations for Research Degrees*

- Available at:

https://myport.port.ac.uk/guidance-and-support/research-degrees/research-degree-guidance/policies-regulations-guidance-and-forms

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Research Degrees Operational Handbook

- Initial point of reference for all Research Students and Supervisors

- Guidance on the key processes and other circumstances that may arise

- Available at: **https://myport.port.ac.uk/guidance-and-support/research-degrees/research-degree-guidance/policies-regulations-guidance-and-forms**

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Major & Annual Review Processes

https://www.qaa.ac.uk//en/quality-code/advice-and-guidance/research-degrees

Purpose of Major Review

- "The purpose of the assessment procedure is to assess whether the student has the capability to complete satisfactorily, within the prescribed time limits, a PhD or MD thesis."

  (Regulations for Research Degrees, Major Review, Section 7.2.1)

Timescale: Major Review

Part-Time PhD/MD – End of Year 2

Full-Time PhD/MD – End of Year 1

MPhil students may submit to upgrade (within these timescales)

Major Review

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Major Review Submission Dates

February intake = 31st January

April intake = 31st March

October intake = 30th September

Major Review

Exceptional June intake = 31st May
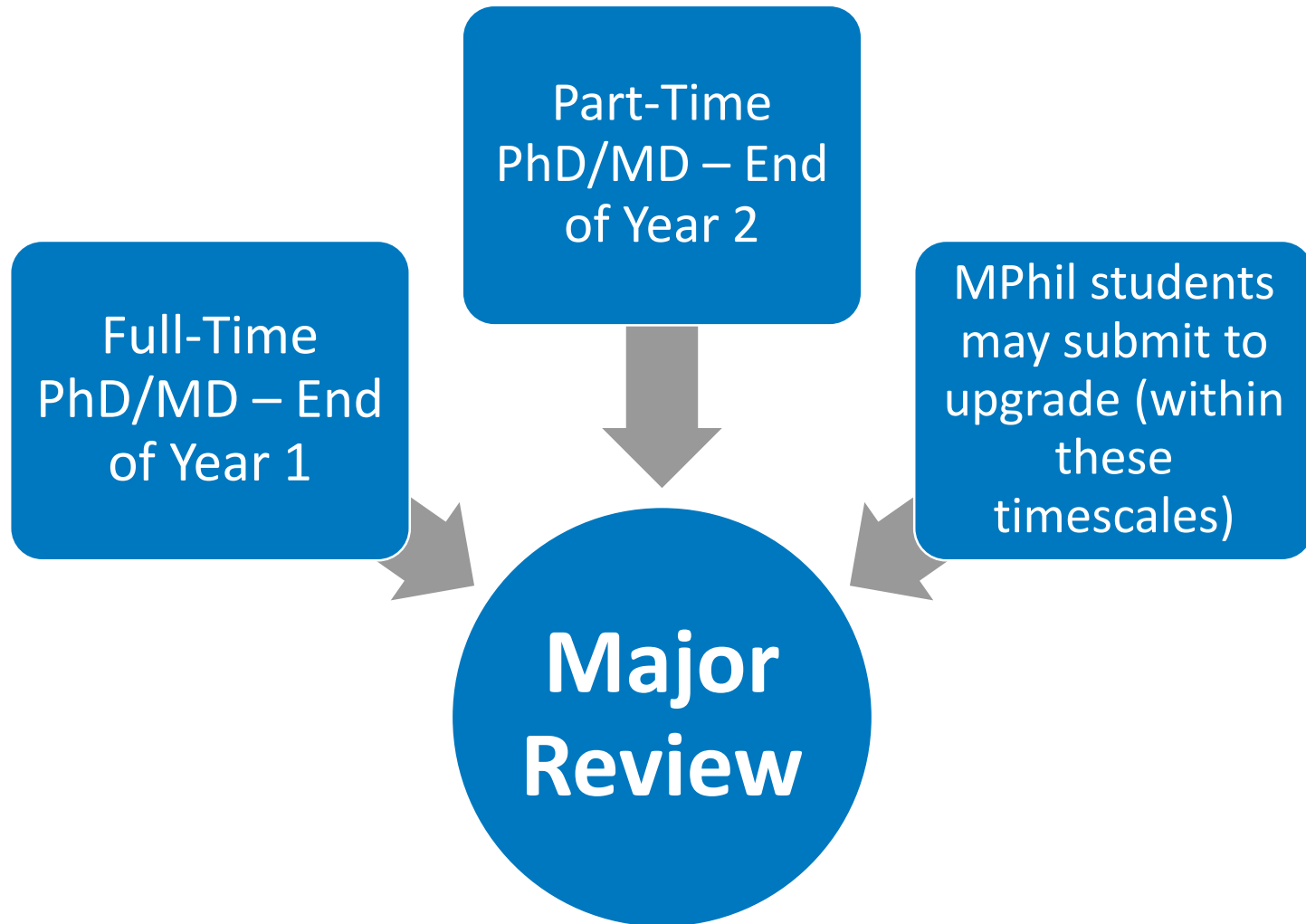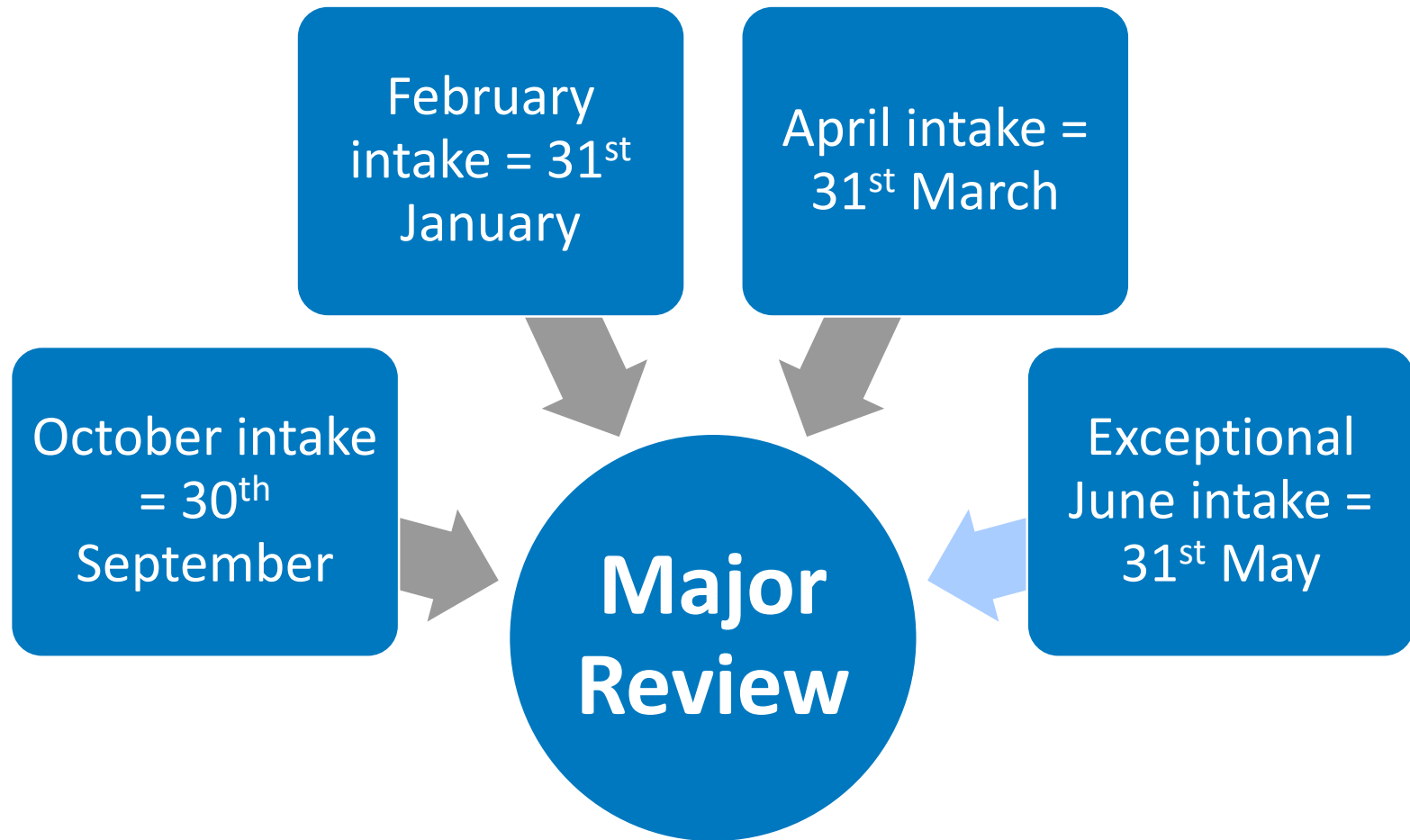
Further information on the Major Review process is available at
https://myport.port.ac.uk/guidance-and-support/research-degrees/research-degree-guidance/major-review-for-pgr-students

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The Major Review Process – Reminder

Research Degrees Team send reminder to PGR Student and Supervisory Team for Major Review to be submitted by ~DATE~

PGR Student completes Major Review document

First Supervisor completes UPR10

FDPGR's & DDPGR's supply list of approved Assessors

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The Major Review Process Submissions

PGR Student submits document to majorreview@port.ac.uk

First Supervisor sends UPR10 form to majorreview@port.ac.uk

Report & UPR10 sent to Assessment Panel (FS & Two Assessors) by Research Degrees Team

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The Major Review Process Meeting

First Supervisor arranges Major Review Meeting

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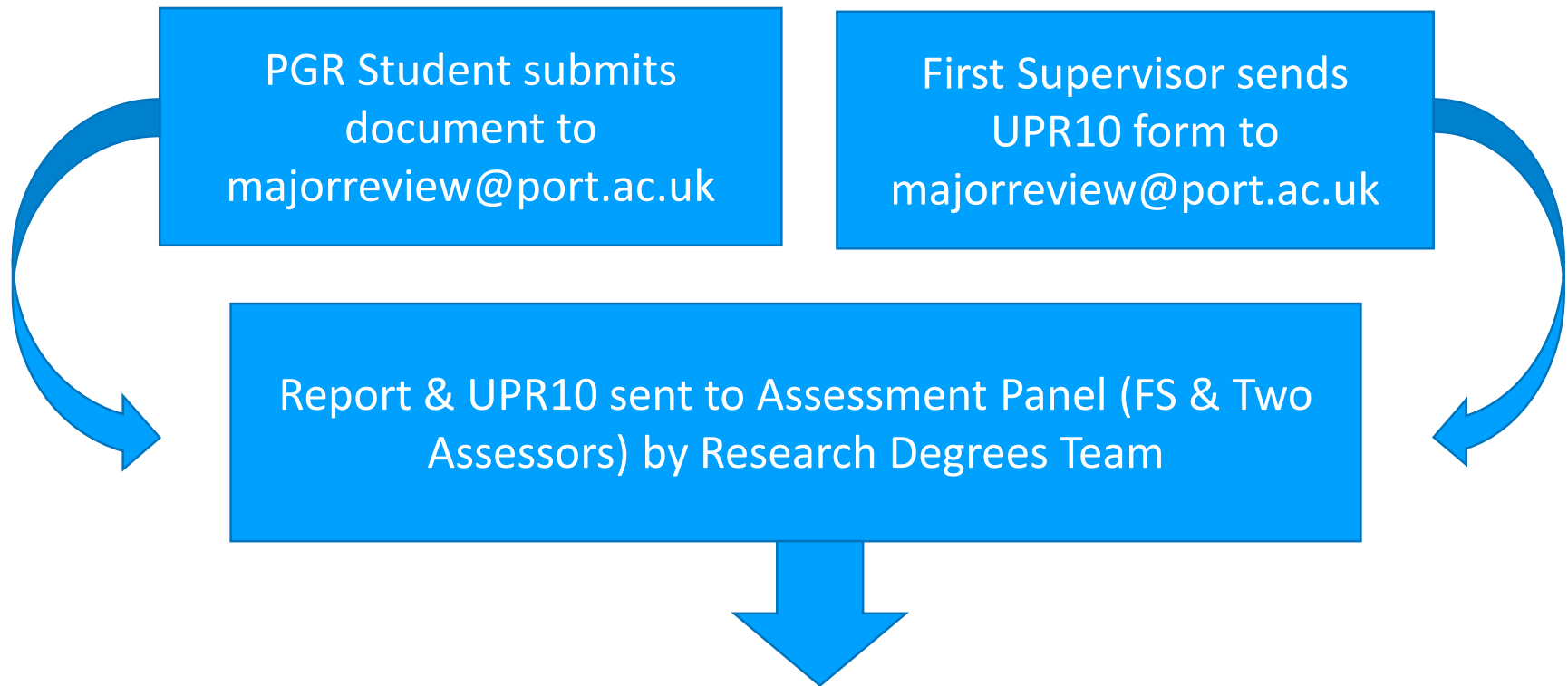
All Panel Members and PGR Student in attendance at the Major Review Meeting

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The Major Review Process Outcomes
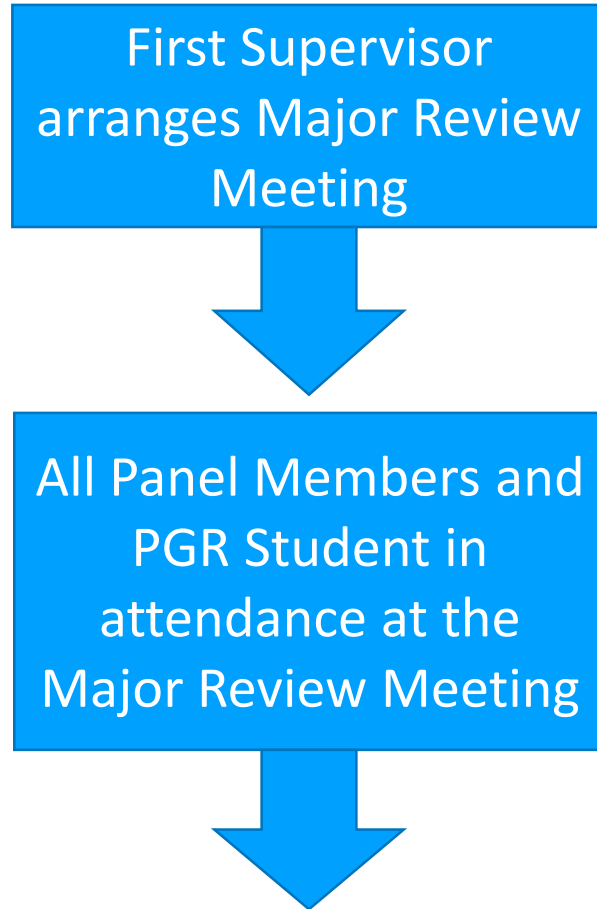
Decisions at Major Review meeting
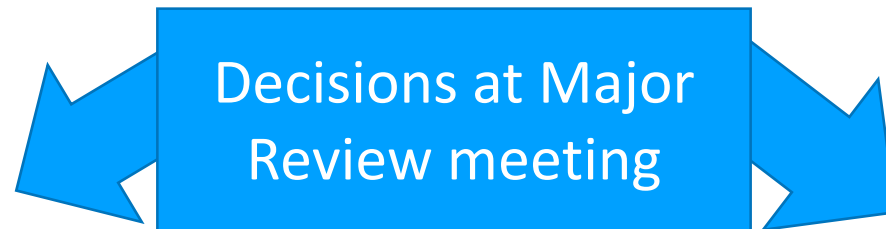
Confirm Registration (PhD or MD) – upgrade to PhD if MPhil Student

Application Insufficient: Final Review meeting required (see next slide)

Assessment Panel recommendation sent to Research Degrees Team (UPR13 form) who confirm decision in writing

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The Major Review Process
Final Review

Application Insufficient: Final Review meeting required

⬇

Work required and submission date notified to PGR Student by Research Degrees Team

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After submission, documents are sent to the panel. First Supervisor organises Final Review meeting date, time & venue and notifies Research Degrees Team

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The Major Review Process Final Review Outcomes

Final Review meeting decisions (via UPR14MR form)

- Confirm Registration (PhD or MD)
- Upgrade MPhil to PhD
- Further Supporting Evidence is necessary
- Change PhD to MPhil
- Continue with MPhil registration
- Discontinue registration

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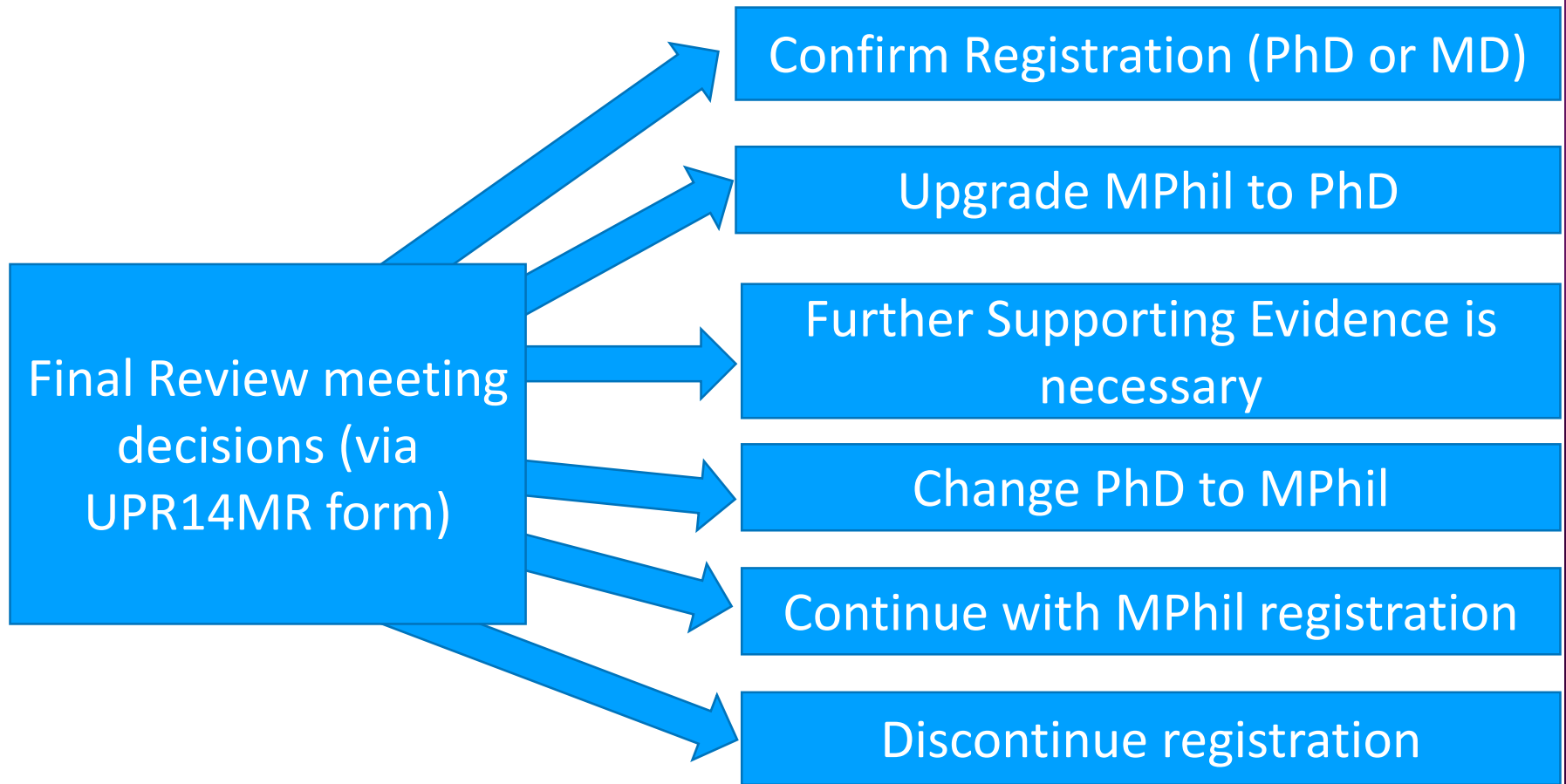
Annual Review

- "The purpose of the assessment procedure is to assess whether the student is actively engaged in the research programme and making satisfactory progress."

  (Regulations for Research Degrees, Annual Review, Section 8.2.1)

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Annual Review

Unless, a Major Review is due

Unless, the PGRS has interrupted their studies

All PGRS for each year of registration

Annual Review

Unless, the PGRS has submitted for examination

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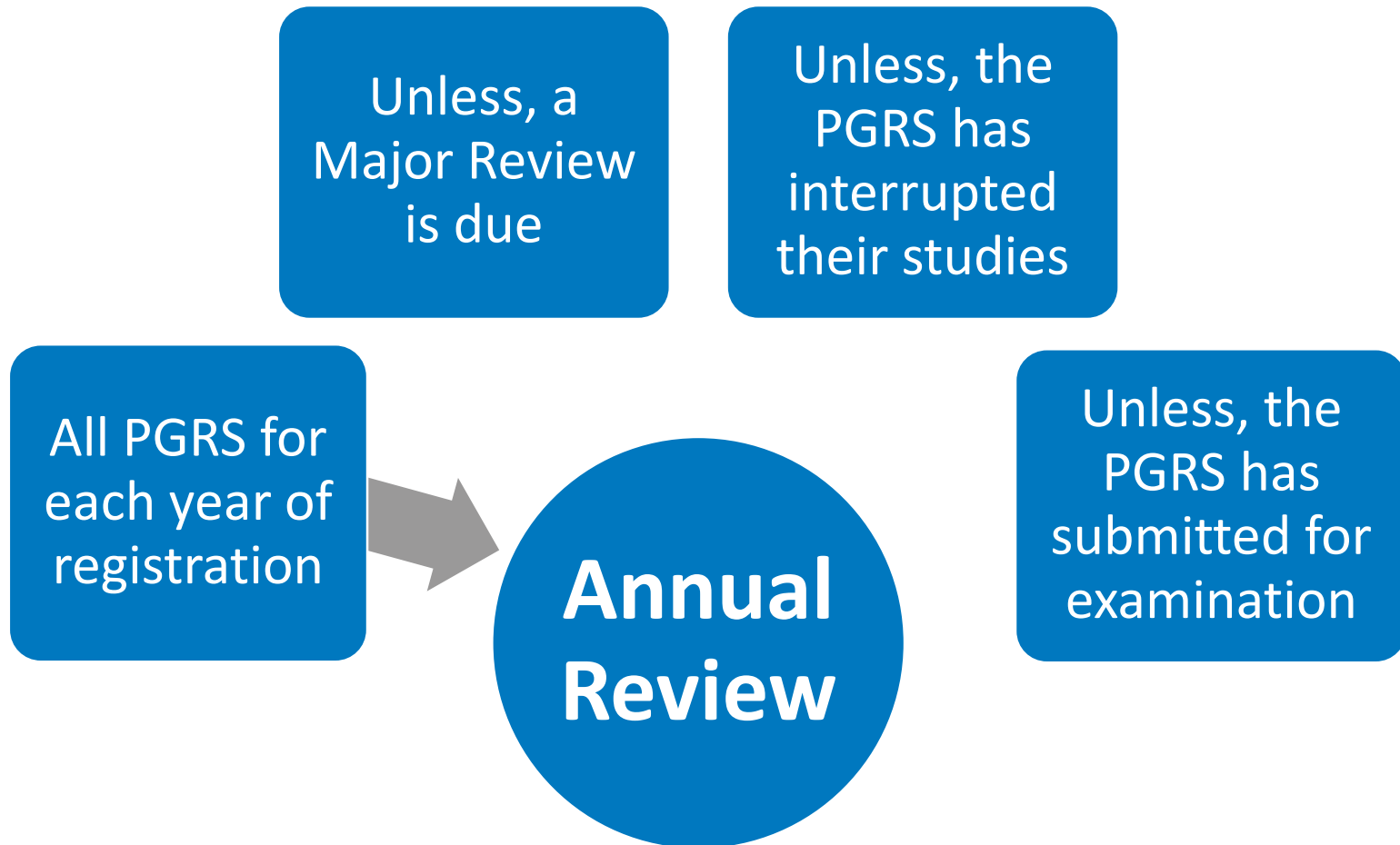
Annual Review Submission Dates

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April intake = 31st March

October intake = 30th September

Annual Review

Exceptional June intake = 31st May
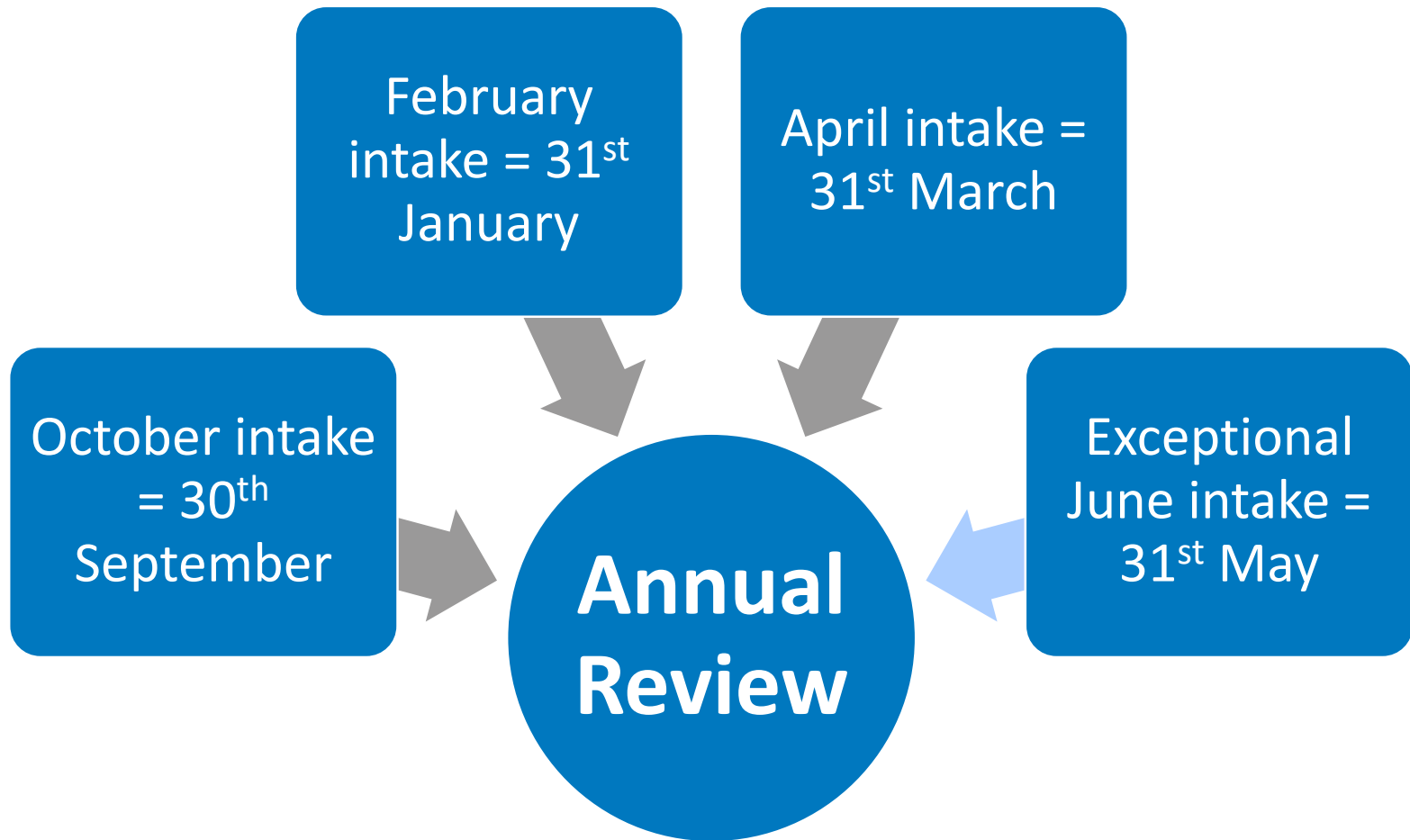
Guidance on the Annual Review requirements is available at
https://myport.port.ac.uk/guidance-and-support/research-degrees/research-degree-guidance/annual-review-for-pgr-students

The Annual Review Process Reminder

Research Degrees Team send reminder to PGR Student and Supervisory Team for Annual Review to be submitted by ~DATE~

PGR Student completes UPR8A and gathers additional evidence as required

Supervisory team complete UPR8B

FDPGR's & DDPGR's supply list of approved Reviewers

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The Annual Review Process Requirements

If you are unsure about the arrangements required please speak to your First Supervisor, a member of your supervisory team or your Departmental Research Degree Coordinator. Alternatively, please email annualreview@port.ac.uk.
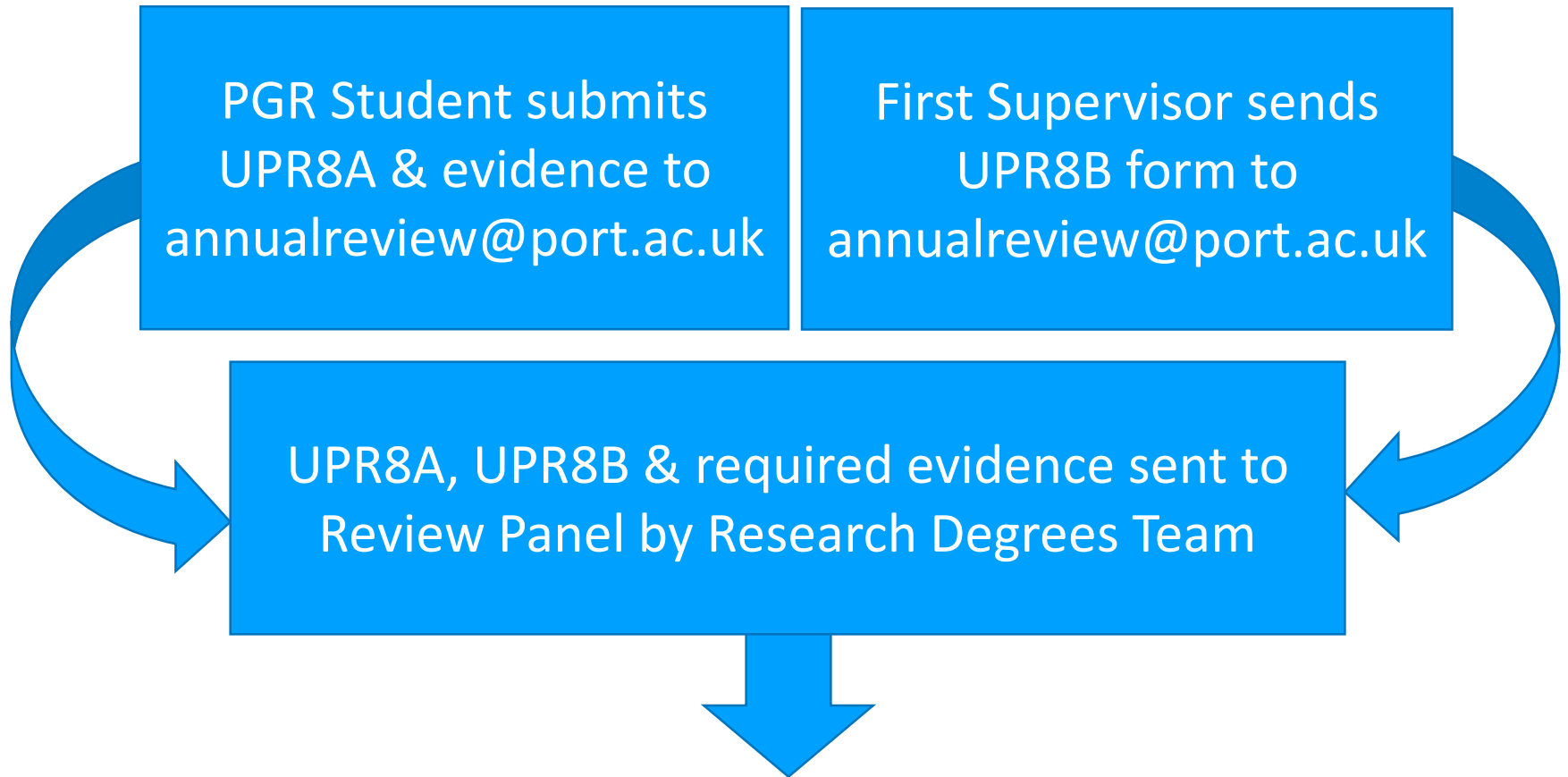
The UPR11 Decision Form

The UPR11 - Annual Review Decision Form will be sent to the reviewers from annualreview@port.ac.uk along with a complete set of documents once the student and supervisory team have submitted. The UPR11 should be signed by all reviewers and returned to annualreview@port.ac.uk shortly after the review.

Documents and forms

- Annual Review Arrangements confirmed by Faculty Research Degrees Committees (Docstore)
- Flowchart for Annual Review (understanding the process) (Docstore)
- Understanding Major and Annual Review - Supervisor Workshop Presentation Slides (Docstore)
- Annual Review Guidance for Students and Supervisors (Docstore)
- Guidance for Reviewers (Docstore)
- Sample Presentation (PDF)
- Sample Presentation (PowerPoint)
- UPR8A - Annual Progress Review - Student Form (.docx)
- UPR8B - Annual Progress Review - Supervisor Form (.docx)
- UPR8B - Guidance for completion (PDF)
- UPR11 - Annual Review Decision Form (.docx)

Research degree programmes

Registration

Change of status

Fees and bursaries

Annual review

Major review

Examination guidance

Policies, regulations, guidance and forms

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The Annual Review Process Submissions

PGR Student submits UPR8A & evidence to annualreview@port.ac.uk

First Supervisor sends UPR8B form to annualreview@port.ac.uk

UPR8A, UPR8B & required evidence sent to Review Panel by Research Degrees Team

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The Annual Review Process Meeting

Annual Review Meeting arranged

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All Panel Members and PGRS in attendance at the Annual Review Meeting

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The Annual Review Process Outcomes

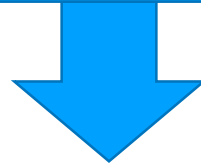Decisions at Annual Review meeting (UPR11)

Confirm Registration

Confirm Registration, with recommendations

Application Insufficient: Final Review meeting required

Review Panel recommendation sent to Research Degrees Team via UPR11 form, who confirm decision in writing

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The Annual Review Final Review

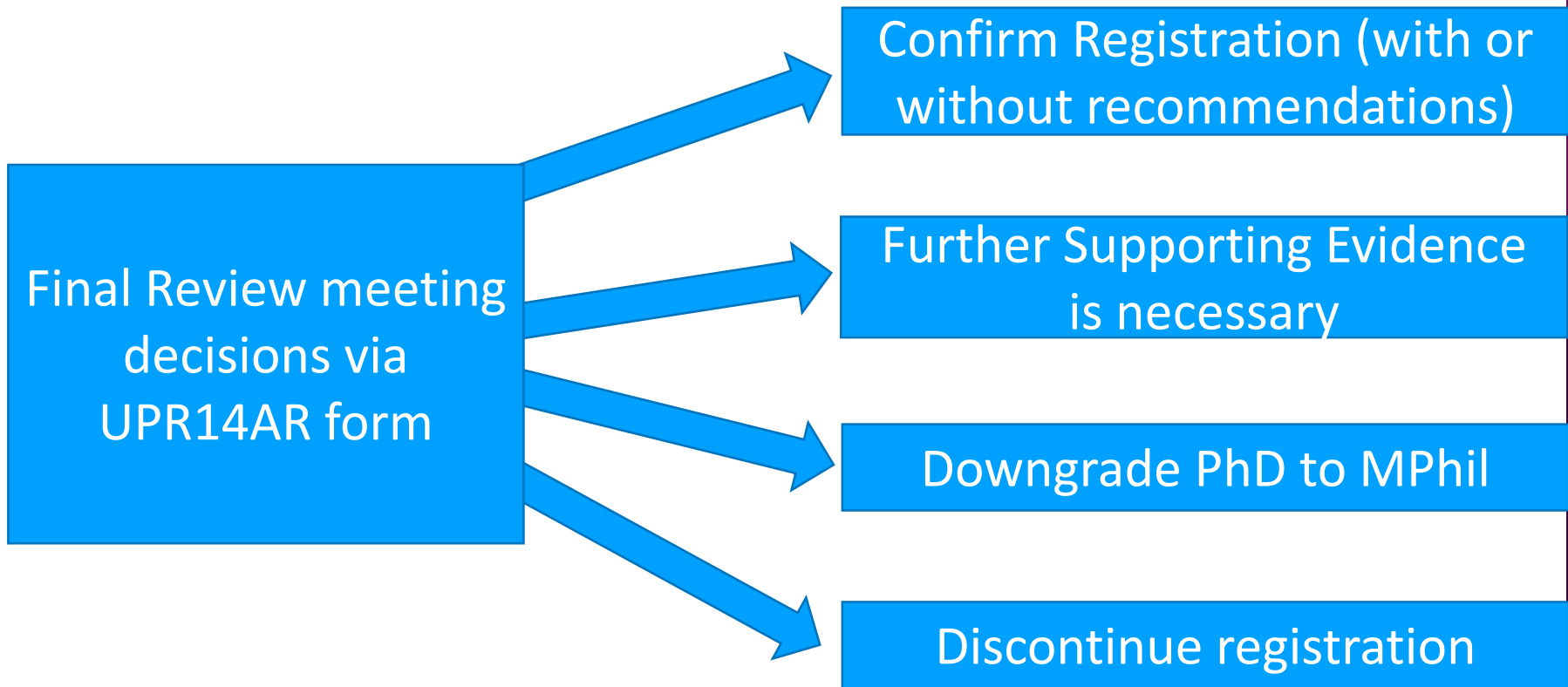Application Insufficient: Final Review meeting required

Work required and submission date notified to PGR Student by Research Degrees Team

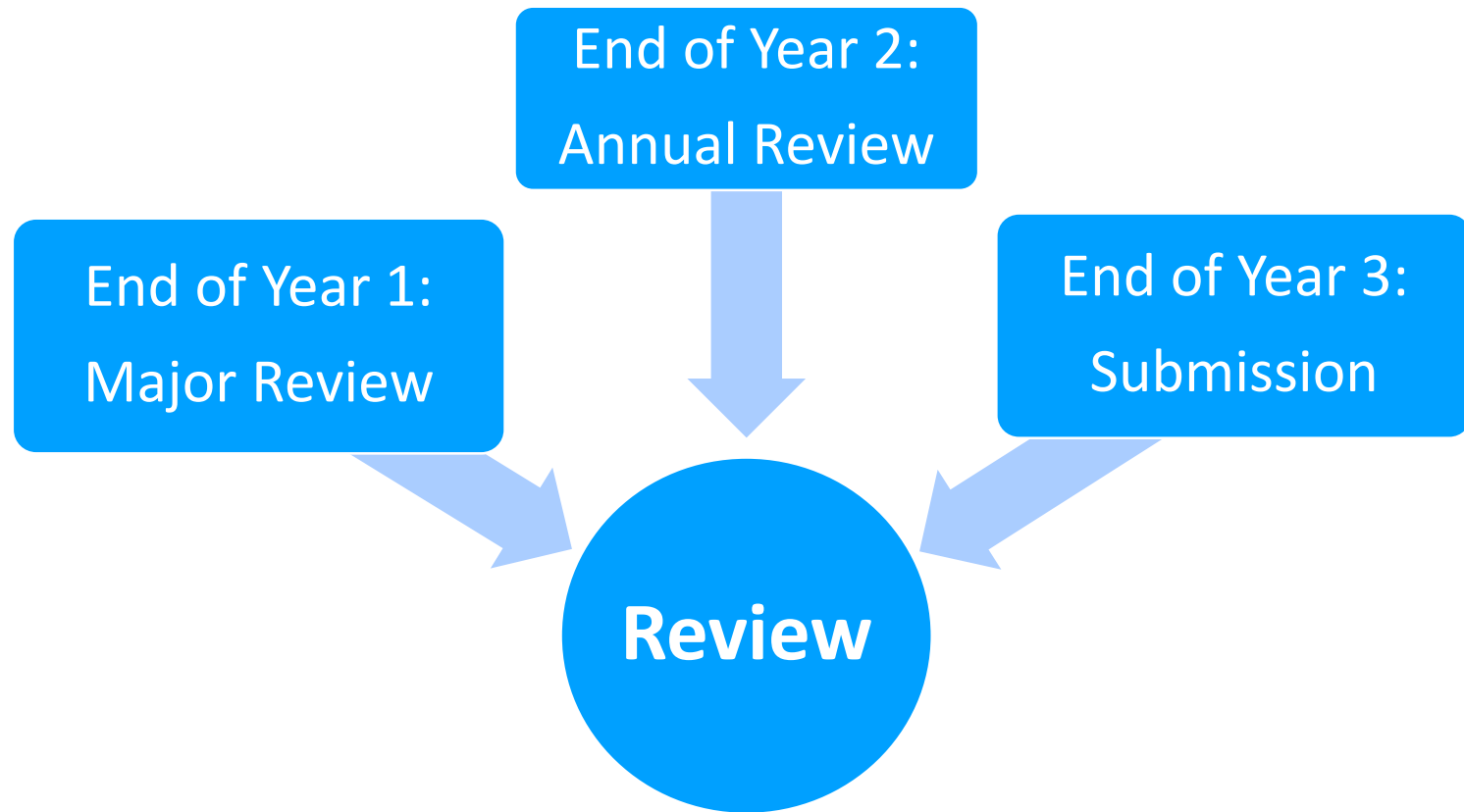After submission, documents are sent to the panel. First Supervisor organises Final Review meeting date, time & venue and notifies Research Degrees Team

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The Annual Review Final Review Outcomes

Final Review meeting decisions via UPR14AR form

→ Confirm Registration (with or without recommendations)

→ Further Supporting Evidence is necessary

→ Downgrade PhD to MPhil

→ Discontinue registration

Review Timescales – Full Time PhD/MD

End of Year 2:

Annual Review

End of Year 1:

Major Review

End of Year 3:

Submission

Review

Review Timescales – Part Time PhD/MD

End of Year 2:

Major Review

End of Year 3, 4 & 5:

Annual Review

End of Year 1:

Annual Review

End of Year 6:

Submission

Review

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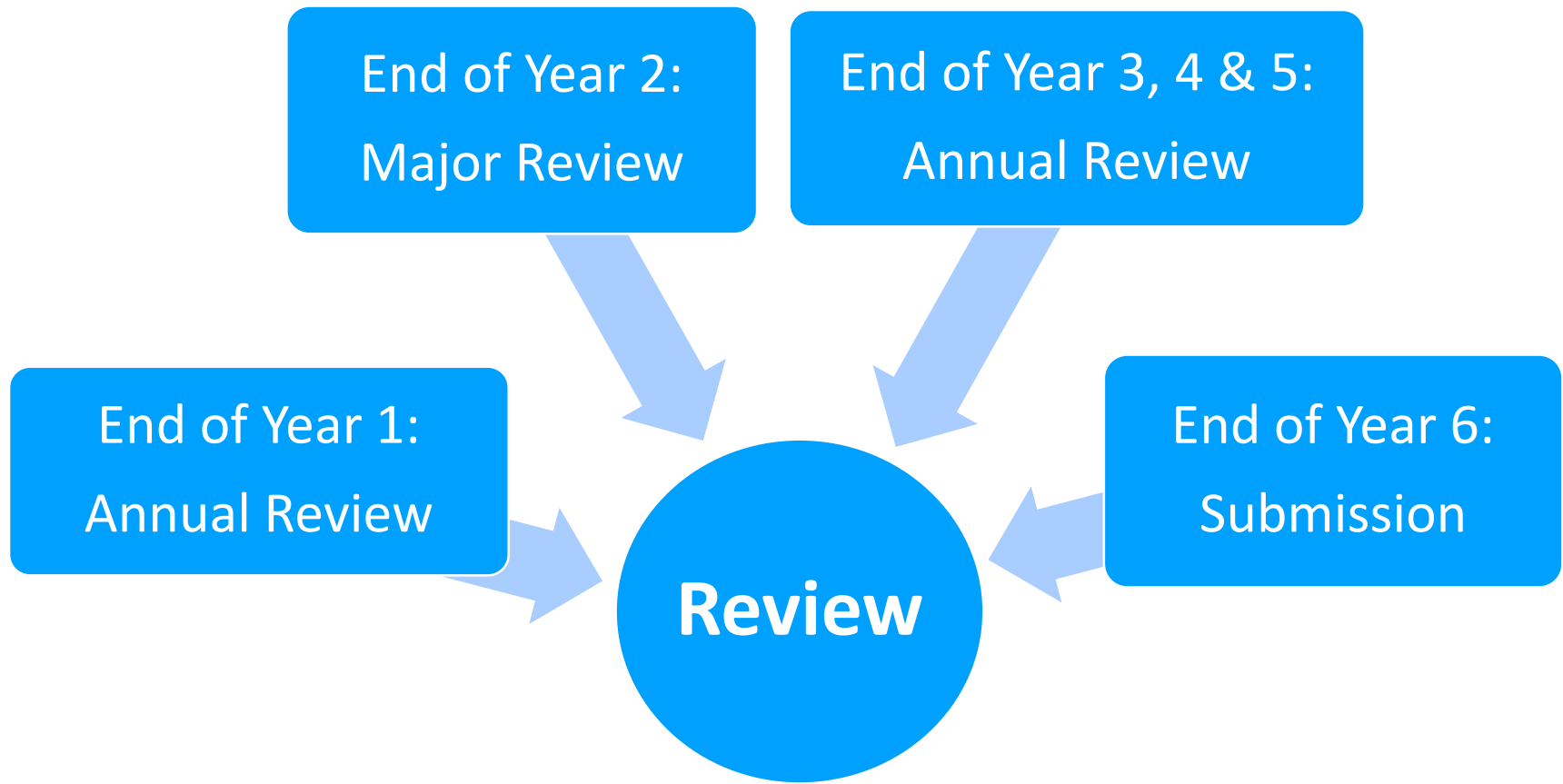
Major and Annual Review Webpages

- These provide guidance and further information on the process to students and supervisors

- Also links to all the forms which are required during the process

- Please bookmark Research Degrees Webpages for copies of all the latest forms and guidance

- https://myport.port.ac.uk/guidance-and-support/research-degrees/research-degree-guidance

Appeals

- PGRS may appeal against the process followed:
  - Major Review
  - Annual Review
  - Interim Examination
  - *Viva voce* Examination

- Details of the procedure are available at… https://policies.docstore.port.ac.uk/policy-260.pdf?_ga=2.168922401.1805421996.1672824919-212315020.1669038142

- Contact…
  - academicappeals@port.ac.uk

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Any further questions

annualreview@port.ac.uk

majorreview@port.ac.uk