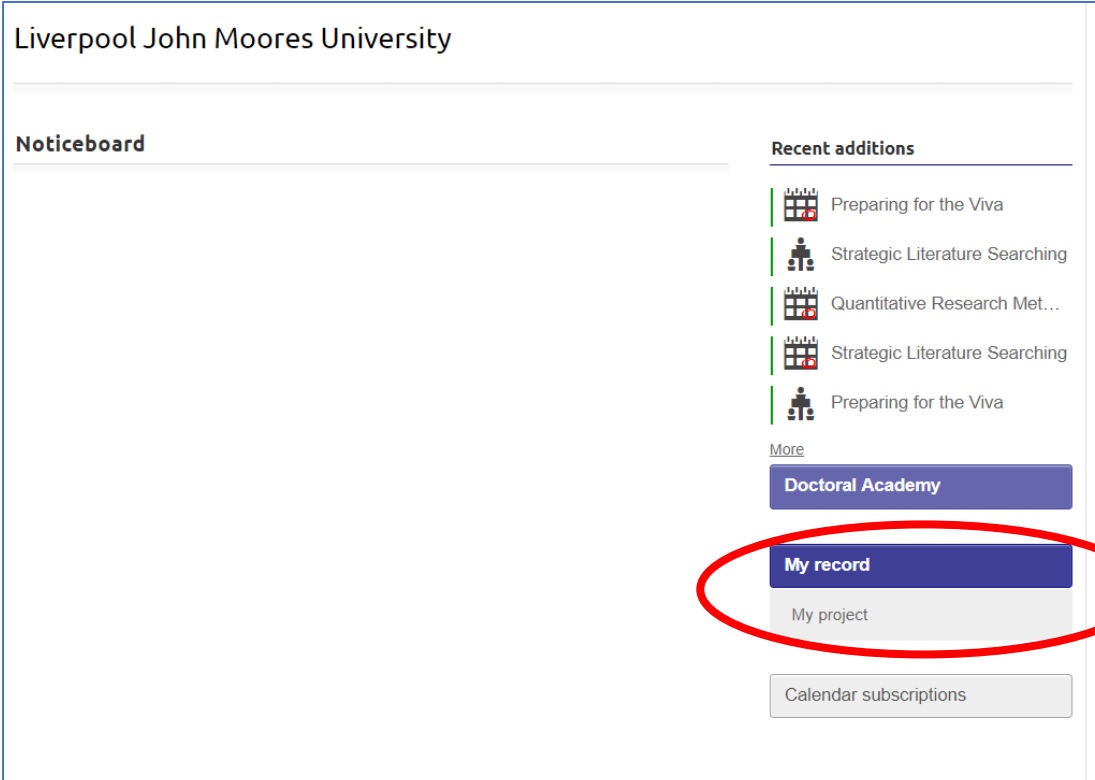# eDoc – Supervision Meeting Records

This guide is intended to help add supervisory meeting records on eDoc. It is the responsibility of the PGR to make sure that notes are recorded following each supervisory meeting. Lead supervisors will need to review and agree the notes before they are finalised as a formal meeting record.

This guidance covers:

1. How supervision meeting notes should be recorded and submitted
2. How supervision notes should be reviewed and either be:
   2.1 Edited by the Lead Supervisor
   2.2 Sent back to the PGR by the Lead Supervisor for revisions
   2.3 Confirmed
3. How follow up notes can be added to a meeting record once the notes have been confirmed.

1. Recording and submitting meeting notes

From the eDoc landing page navigate to the button My Record/My Project

On the main project page, select the button 'Supervision Meetings'

This will take you through to your supervisor meeting history. Here you can create a new supervisory meeting record, review notes from previous meetings and download a PDF copy of your supervisory meetings. To create a new record, select the option 'New supervision meeting'

You will be prompted to add key details about the meeting, including who was in attendance, the date and time that the meeting took place, the location and format:

Edit Supervision notes: Supervision meeting

Participants *

☐ Mr Kirby Patel

☐ Dr Stirling Coleman

Date, time and location

Meeting date

Meeting time

HH:MM (if known)

Location

Meeting format

○ In person

○ Telephone

○ Email

○ Video conference

○ The meeting did not take place

And then add the notes from the meeting and agreed action points:

Meeting notes and files

Discussion notes (researcher)

Agreed action points (to be completed after the meeting)

➡️ You have the option of adding accompanying files:

Accompanying files (optional)

⬆️ Drag files here or choose file...

➡️ You can save notes and go back to them at a later point by selecting the option Save for later at the bottom of the page. Once you are happy with the notes and want to progress to submit them to your supervisors you need to select the option Save and continue.

Save and continue	Save for later

➡️ To submit the notes, you need to select the green button Submit notes and then confirm the submission on the following page:

Supervision meeting - 04 Oct 2023 - Mr Kirby Patel	**STATUS**
04 Oct 2023	Meeting notes gathered, waiting for Mr Kirby Patel to submit for approval.
Name number power idea that the	
Mr Kirby Patel	⚪ Edit meeting notes
Mr Kirby Patel	🟢 Submit notes
Dr Stirling Coleman	
2023 - 2024	Supervision notes

Confirm: Submit notes

2. Lead Supervisor review of notes

Once a PGR has confirmed submission of the notes, they go to the Lead Supervisor for review. An automated message like the one below will be sent by eDoc. The workflow can be accessed by selected the blue box at the bottom of the message 'Review and approve meeting notes' and the supervisor will have a new task on eDoc which will show the meeting record.

Liverpool John Moores University

Supervision meeting - 04 Oct 2023 - Mr Kirby Patel

Please review the supervision meeting notes about the meeting with Mr Kirby Patel, add any further information, and approve the record of the meeting.

Review and approve meeting notes

Lead Supervisors then have three options for how to progress the notes as follows:

Supervision meeting - 04 Oct 2023 - Mr Kirby Patel

Supervision Meeting

Title	Supervision meeting - 04 Oct 2023 - Mr Kirby Patel
Date	04 Oct 2023
Project	Name number power idea that the
Researcher	Mr Kirby Patel
Participant	Mr Kirby Patel
	Dr Stirling Coleman
Academic year	2023 - 2024

STATUS
Waiting for Dr Stirling Coleman to review the notes

CURRENTLY WITH
Stirling Coleman

- Edit meeting notes
- Confirm notes
- Ask for revisions

Supervision notes

Download printable PDF...

CHECKLIST

Meeting

Participants
Mr Kirby Patel
Dr Stirling Coleman

2.1 Edit meeting notes

To edit the notes, select the grey button 'Edit meeting notes'. This will go through to the page where notes can be added. At this point, any concerns about the PGR or the project can be flagged.

Supervisor discussion notes

(Supervisor discussion notes are visible to everyone.)

☐ I have concerns about the researcher's progress

(If you check this box, you will be asked to describe your concerns on the next page.)

If the option 'I have concerns about the researcher's progress is selected the following page will need to be completed:

Edit Supervision notes: Supervision meeting - 04 Oct 2023 - Mr Kirby Patel

Meeting **Concerns**

A researcher may request access to all information recorded about them.

Please describe your concerns about this project

Display this record of concerns to the researcher?
○ Yes
○ No

Save and continue   Save for later

Meeting **Concerns**

The Save for later option allows the user to go back and make further edits. Save and Continue progresses the workflow.

Once Save and Continue is selected, the notes need to be confirmed by selecting the green confirm button on the next page:

2.2 Confirm notes

Select the green Confirm notes button on the meeting record page (see screenshot immediately above). Then select the Confirm: Confirm notes on the next page.

2.3 Ask for revisions

➡ Select the yellow Ask for revisions button. This will then go through to the next page where notes can be added.

➡ **After** the notes have been added in the relevant box, select the Confirm: Ask for revisions button.

The workflow is then returned for the PGR to edit the meeting notes and confirm the revisions.

Once the notes have been confirmed following any of these three options, the status will change to Meeting notes confirmed.

3. Add a follow on note to confirmed notes

Notes can be added to a meeting record after they have been confirmed. Navigate to the specific meeting record that you want to update and select the Add follow-on note option:

Complete the form:

Add follow-on note

Supervision meeting - 03 Jun 2024 - Mr Valdemar Bailey

Notes *

Files

⬆ Drag files here or choose file...

[Save]

The follow-on notes will be visible on the meeting record.