Thesis and Dissertation (TAD) Process Checklist

This checklist is an overview of all the steps required to complete the TAD process. Formatting requirements, individual college templates, digital accessibility standards, video tutorials, deadlines, and TAD workshop dates can all be found here. Use this checklist to keep track of your progress throughout the TAD process.

1. **TAD Submission Form**

☐ Email the completed TAD Submission Form to tad@ohio.edu. TAD Services cannot review your document until this form has been received.

2. **Pre-Defense Format Review** *(recommended, but optional)*
   NOTE the *Special Considerations* **section at the bottom of this checklist**

☐ Do an **Accessibility Check** before submitting your document for review. Under the **Review Tab**, click **Check Accessibility**. If any accessibility issues exist, **do your best to resolve them**. Include a screenshot of your **Accessibility Check** results (after fixing any issues) when you submit your document for review.

☐ Submit your pre-oral defense document***** in Word format (PDF for LaTeX users) to tad@ohio.edu for a preliminary format review (for documents larger than 10 MB, submit via TAD Services' OneDrive account using the uploader at the bottom of the TAD homepage). *You are encouraged to also create and submit a digital accessibility report.*

☐ TAD Services will review the document and email you a list of required formatting revisions.

* *The document should be nearly complete.* TAD Services' role is to check the format of the document only. The student, advisor, and committee members are responsible for the content of the document, and for assuring that the document meets Minimum Digital Accessibility Standards.

3. **Post-Defense Format Review**

☐ **You must orally defend by the published Oral Defense Deadline to graduate in the current semester.** After the oral defense, make all content revisions, obtain a dvisor approval, and use the college template and/or TAD guidelines to ensure your document is formatted correctly.

☐ You must do an **Accessibility Check** before submitting your document for review. Under the **Review Tab**, click **Check Accessibility**. If any accessibility issues exist, **do your best to resolve them**. Include a screenshot of your **Accessibility Check** results (after fixing any issues) when you submit your document for review.

☐ Submit your content-final, advisor-approved document***** in Word format (PDF for LaTeX users) along with a digital accessibility report to tad@ohio.edu or via the TAD OneDrive account no later than the Post-Defense Format Review Deadline.

☐ TAD Services will review the document and email you a list of required formatting revisions.

☐ Make **all** requested revisions to the document.

* *To meet the Post-Defense Format Review Deadline, no further content changes can be made to the document at this point.* Keep in mind that most documents require *at least* two format reviews and some require more, so please make requested changes in a timely manner to ensure that you meet the Final Clearance Deadline.

4. **Oral Defense Form**

☐ Submit one digital or physical copy of the original Oral Defense Form signed by all committee members to tad@ohio.edu. This should be sent by your college on your behalf.

5. **Submit Final Documents**

After you have made **all** requested revisions to your document and need no more changes:

☐ Run **Accessibility Check**. Under **Tools**, open **Accessibility** and run **Accessibility Check**. Ensure the **Create accessibility report** and **Attach report to document** boxes are checked under **Report Options**, as well as the **All pages in document** option under **Page Range**, and **Select All** under **Checking Options**. Then **Start Checking**. If any accessibility issues exist, they will show up to the left of the PDF. **Fix all accessibility issues.**

☐ **Submit the final Word and PDF documents (*PDF only for LaTeX users*) to TAD Services. You must also include the digital accessibility report for the final PDF document.** TAD Services will review the final documents and place the approval page in the PDF, then return the final PDF and accessibility report in an email titled "Document Format Accepted", along with instructions for uploading to OhioLINK.

6. **OhioLINK Upload**

☐ **Save the final approved document PDF emailed to you by TAD Services and upload the document to OhioLINK**, following the instructions provided on the Forms and Templates page on the TAD website. *You must also upload the PDF digital accessibility report to OHIOLink as a separate document.* TAD Services is emailed automatically when the OhioLINK upload has been completed.

7. *Doctoral Students Only--***Survey of Earned Doctorates (SED)**

☐ **Doctoral students go to https://sed-ncses.org to complete the SED.** TAD Services is emailed automatically when the SED has been completed.

8. **TAD Process Complete** (Final Clearance Deadline)

☐ **When all required documents have been received and all steps completed, TAD Services sends an email titled "TAD Process Complete"** to the student, advisor, college, and graduate director, containing the final PDF and the Oral Defense Form, electronically signed by TAD Services.

SPECIAL CONSIDERATIONS FOR PLANNING YOUR DEFENSE

College of Health Sciences and Professions

Your document must be sent to Dr. Sally Marion-Fetty at marinels@ohio.edu for document edits and college approval no less than two weeks before TAD's Post-Defense Format Review Deadline. *You should schedule your oral defense at least two weeks earlier than the Oral Defense Deadline.*

Patton College of Education

Your **final document** should be sent to Chip Rice (ricer@ohio.edu) for initiation of the Turn It In (TII) process check for similarity and review by the home department and College no later than the Monday following the Oral Defense deadline. Documents submitted after this date may not be processed in time to meet subsequent TAD deadlines.

Russ College of Engineering and Technology

A PDF of your **pre- and post-defense** manuscripts should be emailed to Jyl Steinberg at jyl.steinberg@ohio.edu for a mandatory plagiarism check.

OPTIONAL FORMS:
To **register your copyright** after uploading it to OhioLINK, go to https://copyright.gov/registration/. A $45 fee must be paid online.

To **request a publication delay,** use the Publication Delay Form found at [https://www.ohio.edu/graduate/current-students/thesis-dissertation-services/forms-templates.](https://www.ohio.edu/graduate/current-students/thesis-dissertation-services/forms-templates) Return the completed form to TAD Services prior to the Final Clearance Deadline.