

## 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, video tutorials, deadlines, and TAD workshop dates can all be found at [www.ohio.edu/tad](http://www.ohio.edu/tad). 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](mailto:tad@ohio.edu).** TAD Services cannot review your document until this form has been received.

### 2. Pre-Defense Format Review (*recommended, but optional*)

- Submit your pre-oral defense document\*** in Word format (PDF for LaTeX users) to [tad@ohio.edu](mailto: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).
- TAD Services will review the document and email you a list of required formatting revisions.**
- Make *all* requested revisions to the document.

\* 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.

### 3. Post-Defense Format Review

- You must orally defend by the Oral Defense Deadline to graduate in the current semester.**
- After the oral defense, make all content revisions, obtain advisor approval, and use the college template and/or TAD guidelines to ensure your document is formatted correctly. Submit your content-final, advisor-approved document in Word format (PDF for LaTeX users) to [tad@ohio.edu](mailto: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 copy or scan of the original Oral Defense Form** signed by all committee members to [tad@ohio.edu](mailto:tad@ohio.edu). This may be sent from your college on your behalf.

### 5. Submit Final Document Format

- After you have made all requested revisions to your document and no further changes are needed, TAD Services approves the document** and requests both a final Word and PDF version.
- Submit the final Word and PDF documents** (PDF only for LaTeX users) to TAD Services. **TAD Services will review the final documents and place the approval page in the PDF**, then return the final PDF in an email titled "Document Format Accepted", along with instructions for uploading to OhioLINK.

## 6. OhioLINK Upload

- Save the final 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. TAD Services is emailed automatically when the OhioLINK upload has been completed.

\*It usually takes one semester after the degree is conferred for documents to appear online in OhioLINK, ProQuest, and Alden Library's ALICE database.

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

- 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

- 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.

### Optional Forms:

- To register your **copyright** go to [www.copyright.gov/eco](http://www.copyright.gov/eco) and follow the online instructions. A \$35 fee must be paid online (due after final document upload to OhioLINK).
- To request a **publication delay**, go to [www.ohio.edu/tad](http://www.ohio.edu/tad) to fill out the Publication Delay Form, sign and return to TAD Services (due by Final Clearance Deadline).

### Special Considerations for Planning the Defense

#### College of Health Sciences and Professions

Your document must be sent to Dr. Sally Marinellie at [marinels@ohio.edu](mailto:marinels@ohio.edu) for document edits and college approval no less than two weeks before TAD's Post-Defense Format Review Deadline. For this reason, please schedule your oral defense two weeks earlier than the Oral Defense Deadline.

#### Patton College of Education

Your final document should be sent to Chip Rice ([ricer@ohio.edu](mailto: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](mailto:jyl.steinberg@ohio.edu) for a mandatory plagiarism check.