



## 2023 Update to Guidelines and Procedures for Remote

### Master's Thesis and Doctoral Dissertation Oral Examinations

#### Preamble

The Supervisor is responsible for setting up the Zoom meeting for hybrid and remote defences. Zoom offers features suitable for defences held via videoconference, so at this time, remote and hybrid defences for graduate students at UBC Okanagan will be supported using Zoom. The following instructions assume some familiarity with the basics of running and installing Zoom, but explain key settings that are needed for defences held online. Many of these settings are now defaults, but still worth checking to ensure they are in place for the defence.

#### Remote Oral Examinations

The Supervisor must send confirmation to the College of Graduate Studies at [gradtheses.ok@ubc.ca](mailto:gradtheses.ok@ubc.ca) affirming that all examining committee members and the candidate have tested Zoom and are prepared to access it for the oral examination. If any member becomes ill or is otherwise unavailable and cannot attend, please postpone the examination and notify [gradtheses.ok@ubc.ca](mailto:gradtheses.ok@ubc.ca) immediately. Remote and hybrid defences will adhere to standard policies and procedures applicable to [Master's thesis oral examinations](#) and [doctoral dissertation oral examinations](#). The following instructions indicate where adjustments are needed to ensure defences conducted online adhere to CoGS' policies.

As we cannot control the quality of each participant's internet connection, participants should be prepared with alternatives should technical problems occur (such as poor audio or visual quality or dropped connections) and the Neutral Chair should be prepared to uphold their responsibilities as outlined below. Alternatives could include providing the Supervisor and/or Neutral Chair with a list of email addresses and telephone numbers of the candidate and all committee members prior to the oral examination.

Audiences for the candidate's presentation and the questioning period are allowed, with some restrictions. Use of Zoom's Waiting Room to screen entrance is required to ensure that only appropriate audience members are present. We have had instances of Zoom bombing on our campus and need to be careful to provide a supportive environment for our students. The link to the Zoom meeting should not be publicized, but instead provided by the Supervisor on an individual basis to those wishing to attend.



## Downloading and Installing Zoom

All faculty and staff at UBCO can request to have access to Zoom for all of their video conferencing needs. For details, visit: <https://it.ubc.ca/services/teaching-learning-tools/zoom-video-conferencing>.

## Scheduling a Zoom Conference Meeting for a Remote Defence/Examination

To set up a meeting, go to <https://ubc.zoom.us> and log in with your credentials. Visit <https://youtu.be/o-dglfd5g6E> for an instructional video on setting up a Zoom meeting. Note: although Zoom meetings can be scheduled using the Outlook plugin, it is necessary to set up the meeting using the website noted above in order to add the poll questions needed for oral examinations conducted remotely.

- **Before clicking on “Schedule a Meeting” go to “Settings” and disable “Private Chat”** to prevent the candidate receiving private messages that the committee cannot see.
- Do not choose the option "Hosting a meeting using your Personal ID" because it is more susceptible to Zoom bombing.
- Set the Start time for 30 mins prior to scheduled examination start.
- Set the Finish time 30 mins after scheduled examination completion (so set up the Zoom meeting for a full 4 hours to allow 3 hours for the exam itself).
- Meeting ID: select Generate Automatically.
- Audio: Select both computer and telephone, in case of connection difficulties. If there are international participants, it is helpful to them to add those countries so that they have local numbers in case of connection issues.
- Meeting options:
  - **Select “Enable Waiting Room”**
  - **Alternative hosts: List the Neutral Chair here so that they can moderate the questioning.**

## Inviting Examiners to the Zoom Conference Meeting

It is critical that the Supervisor:

- share the meeting ID and Zoom link with anyone invited to the meeting at least 72 hours in advance of the time set for the defence; and
- send confirmation to CoGS at [gradtheses.ok@ubc.ca](mailto:gradtheses.ok@ubc.ca), at least 48 hours in advance of the scheduled defence, affirming that ZOOM was tested by all members of the committee as well as the candidate.



## Supervisor Responsibilities for Remote Defences

The Supervisor is responsible for the following:

- Submitting the required forms to the College of Graduate Studies in accordance with the required timelines [for Master's defences](#) and [doctoral dissertation oral examinations](#) respectively, and confirming that the Neutral Chair has received their Responsibilities and Procedures for [Master's defences](#) or [doctoral oral examinations](#) as applicable.
- Creating the Zoom meeting as per the instructions above.
- Obtaining telephone numbers and email addresses from the candidate and all examining committee members attending by Zoom in case of connection difficulties.
- When the file size of the candidate's presentation is substantial, it is recommended that the supervisor have a copy of the presentation on hand to share if committee members ask for a backup copy in case connection speed is an obstacle. If the presentation file is too large, rendering it as a PDF creates a file of reasonable size, that can be circulated to examiners by email at the beginning of the meeting.
- Prior to the meeting, identify a method through which to contact the candidate (such as by text message) to let them know when they can re-enter the Zoom meeting after the in-camera deliberations are finished.
- Ensure that you know [how to remove participants from a Zoom meeting](#) should the need arise, especially when it is time for the in-camera deliberations to begin.
- Ensure that you know [how to assign the host controls to the Neutral Chair](#) in order to allow them to operate the "straw vote" at the beginning of the committee's deliberations.
- Ensure the student is made aware of services for dealing with emotions or stress that can emerge after the defence. The College of Graduate Studies recognizes the importance of a social network and/or social engagement with others following the defence. This service is encouraged for all students, as even the most successful need safe space to convey thoughts and emotions such as "I can't believe they asked 'x'" or "I rocked 'x' question." Not all students feel comfortable sharing their reactions with supervisors and/or have a social network available to them at this time to emotionally debrief. Ensure that the student is aware that [The Psychology Clinic](#) is available for pre- and post-defence conversation. They can be contacted at the clinic by e-mail at [ipc.ok@ubc.ca](mailto:ipc.ok@ubc.ca) or phone: 250-807-8241 (press 1 for reception). The phone and e-mail will be checked periodically, and you will be connected with someone to answer questions and/or arrange an appointment with a clinician.
- As with standard in-person oral examinations, the Supervisor submits the Doctoral Dissertation/Master's Thesis Approval and Program Completion Form electronically to the College of Graduate Studies with all signatures once any required revisions have been completed.



### Neutral Chair's Additional Responsibilities at Remote Defences

- In addition to the standard Neutral Chair's Responsibilities when moderating in-person [Master's Thesis Defences](#) and [Doctoral Dissertation Oral Examinations](#), during remote defences the Chair must guarantee that the standards of the defence have been met and that CoGS' requirements for oral examinations have been satisfied within the remote environment.
- At the start of the Zoom meeting, the Chair checks that all members have functioning audio as well as video (which facilitates communication through hand gestures).
- Throughout the examination, ensures that communication among all participants is clear, understandable, and sufficiently audible.
- At the beginning of the remote defence, the Chair must inform the candidate and all members of the committee that should technical problems arise, the Chair will temporarily suspend the defence until these problems have been resolved.
- If technical problems arise, the Chair should:
  - 1) troubleshoot and attempt to resolve poor connection issues.
  - 2) If the situation cannot be resolved within 30 minutes, where the connection is poor and interferes with the integrity of the defence and/or the candidate's ability to proceed unencumbered, the Chair suspends the defence.
  - 3) Immediately following this suspension, the Chair must submit a report to [peter.simpson@ubc.ca](mailto:peter.simpson@ubc.ca), copied to at [gradtheses.ok@ubc.ca](mailto:gradtheses.ok@ubc.ca), documenting the problems and decision to suspend [in order](#) to start the process of scheduling a new defence.
- Once a defence has been successfully completed, the Chair submits the Neutral Chair's Report electronically within two business days following the defence.

### To Preside over the Defence, the Chair should:

- Ensure that you have been made a host of the Zoom meeting.
- Admit all approved attendees from the Waiting Room.
- The sequence of events shall proceed in the same order as with standard, in-person defences. In addition, during remote or hybrid defences, the Chair advises examining committee members and members of the audience to remain muted when the candidate is presenting and when it is not their turn to ask questions.
- Examiners and audience members are asked to silence and refrain from using electronic devices (cell phones) during the defence (unless in emergencies), and to mute their microphones when they are not speaking.



### Procedures during the Oral Examination:

- After the Chair provides the standard announcements as to the order of procedures and timing, the supervisor enables the Share Screen option so that the candidate can present their synopsis.
- The presentation screen is shared with the committee.
- The defence then proceeds as per standard practice.
- The Chair periodically checks that any remote examining committee members have not been disconnected.
- Between the presentation and the questioning period, the Chair ensures that all audience members who do not wish to stay for the questioning period have left the meeting.
- At the end of the questioning period, the Chair then asks the candidate to leave the meeting and informs the candidate as to how they will be invited back into the meeting after the deliberations. This can be accomplished by putting the candidate in the Waiting Room in Zoom. If possible, the Chair or Supervisor should arrange to text the candidate when deliberations are complete so that the candidate is alerted as when they will be allowed back into the meeting.

### The In-camera Session

- As with in-person examinations, this process starts with a "straw vote" on both the oral and dissertation/thesis outcomes. It is easiest to use the poll function in Zoom to determine examining committee votes. Do not share the results with the committee on the screen.
  - Note that all hosts can see the results of the poll, so it is best to ensure that at this point, only the Chair has host privileges.
  - If the poll function becomes unavailable or is not functioning, ask committee members to submit their votes to you by private message, such as via email. They cannot use the private chat function because it has been disabled during setup of the Zoom meeting.
- The Chair announces the numerical results of the vote without indicating who voted or how each person voted.
- Following voting, the committee must come to a consensus vote on each of the written thesis and oral defence.
- Sequential votes can be conducted using the same polls.
- All standard practices apply to deciding upon the written thesis and oral defence, as outlined in the Neutral Chair's Responsibilities and Procedures for in-person defences.



### Communicating the Decision to the Candidate

- When the Chair and the Examiners have completed the deliberations, the Chair invites the candidate back into the meeting by admitting them back in from the waiting room, texting them if necessary, and informs them of the result.
- All standard practices apply for discussing student work that follows the oral defence.
- All standard practices apply for the signing and submission of forms.

### Following the Defence

- As with in-person defences, the Neutral Chair completes the Neutral Chair's report, and submits it electronically to [gradtheses.ok@ubc.ca](mailto:gradtheses.ok@ubc.ca). (Note: There are no signatures required on the Neutral Chair's report except that of the Neutral Chair.)
- The Supervisor collects all signatures for the Doctoral Dissertation Approval and Program Completion Form or Master's Thesis Approval and Program Completion Form as applicable and submits it to the College of Graduate Studies once all required changes have been made to the dissertation/thesis.