

## How to Process a Programme Transfer Request

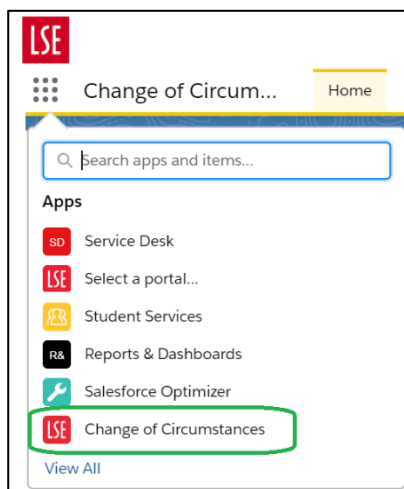
- 1) You will receive an email notification whenever a student, for whom you are the assigned First or Second academic approver, submits a Programme Transfer request. You can access Programme Transfer requests in two ways:

### Accessing a Request via Email Notification

- a. When you receive an email notification, a clearly marked hyperlink to the request page will be included. Click on the link to directly access the request in Salesforce.

### Access a Request via Salesforce Login

- a. To access the request form without clicking on the email link, [log in to Salesforce here](#) using your standard LSE login credentials.
- b. You will be taken to a dashboard called **All Apps** which has a link to the Change of Circumstances App. If it does not appear, you can navigate to it by clicking on the app launcher (9-dots symbol) on the left-hand side and selecting **Change of Circumstances**. If the app doesn't appear in the list, click **View All** to view the full list.



- 2) You will see a dashboard called **My Reviews to Action**. To open a request, click on its blue number in the **Request Name** column under **My Pending Reviews**. An example is circled in green in the screenshot below.

My Reviews To Action					
Approvals					
My Pending CoC Reviews					
6 Items • Sorted by Request • Filtered by My approvals - Record Type, Complete • Updated 3 minutes ago					
Request	Requester	Review Type Name	Created Date	Decision	
1 17128	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	08/12/2020 14:40		
2 17114	Postgraduate Research AA-Student	Home Department Review (PhD)	07/12/2020 11:27		
3 17113	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	07/12/2020 10:45		
4 17112	Postgraduate Research AA-Student	1st Review: CSM	07/12/2020 09:45		
5 17086	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	05/12/2020 11:39		
6 17063	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	03/12/2020 19:49		

- 3) Check the **Study Details** section to ensure you are processing the correct student's request. Read the guidance notes below the Study Details section.

Request 17139

Study Details Student Cases

Program Enrolments for Parent Contact (4)

Programme Enrol...	Year and Programme	Enrolment Status	Mode of attendance	Fee Status
1 PE-66696	2020/1 - MPhil/ PhD in Economic History	R - Registered Student	F - Full-time	HUK - UK Resident
2 PE-21974	2019/0 - MPhil/ PhD in Economic History	R - Registered Student	F - Full-time	HUK - UK Resident
3 PE-21973	2018/9 - MSc in Economic History - Year 99	UAR - Unregistered, Awaiting Results (PG only)	F - Full-time	HUK - UK Resident
4 PE-21972	2017/8 - MSc in Economic History - Year 1	R - Registered Student	F - Full-time	HUK - UK Resident

View All

Course Connections for Parent Contact (1)

Course Connection ID	Course Name	Status	Enrolment Year and Programme
1 CC-2191	MY561 - Social Network Analysis	A-First attempt	2019/0 - MPhil/ PhD in Economic History

View All

Please ensure you provide information required by RDSC for consideration of this request, including your comments on any work plans and supervisory and additional support requirements. Advice is available from the PhD Academy.

Before the student submitted this application it is expected that the options (and any potential issues) will have been discussed with supervisors and/or a relevant departmental contact. This is to ensure that:

- the student's wellbeing is supported and that plans are reasonable, academically appropriate and realistic;
- academic and supervisory support can be provided throughout the remainder of the degree programme; and
- alternative options have been considered.

- 4) If the student has submitted any documentation to support their request, you'll see it under **Files**. You can view it without downloading by clicking on the file's title. You are also able to add your own files if you like.

Files (1) Add Files

Test Evidence for CoC upload  
03-Aug-2020 · 12KB · docx

View All

- 5) If you are a member of the student's Home Department, **proceed to step 6**. If you are the proposed Programme Director, **proceed to step 11**.

- 6) Scroll down to complete the **Scorecard** i.e. to confirm that the Department has reviewed this request for approval. On the right-hand side (blue border in the screenshot below) you'll see the student's request form answers. You can scroll through the student's answers.

Scorecard

Home Department Review (PhD)

Decision

\*Please confirm you or a relevant departmental colleague have discussed this request with the student including exploring alternative options

Yes

No

Please provide a departmental statement for RDSC review that outlines your comments on the application.

\*Please confirm your decision on the student's request

Recommended

Not recommended

Cancelled

Submit Review

Have you been funded by

ESRC/AHRC

Do you hold a student visa to study at LSE?

No

Have you discussed this request with your Mentor or departmental contact?

Yes

What's the name of the person you discussed your request with?

Professor Smith

Please outline the reasons for your request as discussed with your Academic Mentor or relevant departmental contact.

Transfer details

Proposed new programme of study

- 7) Once you have reviewed the request, answer the questions on the left-hand side (yellow border in the screenshot above).
- 8) Click **Submit**. The request will now be sent to the proposed Programme Director.
- 9) Scroll down to complete the **Scorecard** i.e. to confirm your decision on whether to recommend this request for approval. On the right-hand side (blue border in the screenshot below) you'll see the student's request form answers. You can scroll through the student's answers.

The screenshot shows two side-by-side panels. The left panel, titled 'Scorecard', has a yellow border and contains a 'Decision' section with three numbered instructions and three radio button options: 'Recommended', 'Not recommended', and 'Cancelled'. The right panel, with a blue border, displays the student's answers to various questions: 'Have you been funded by' (No external funding), 'Do you hold a student visa to study at LSE?' (No), 'Have you discussed this request with your Mentor or departmental contact?' (No), 'What is the start date of your interruption?' (21 December 2020), 'What is the end date of your interruption?' (17 June 2021), and 'Have you interrupted your studies at LSE before?'.

- 10) Once you have reviewed the request, answer the questions on the left-hand side (yellow border in the screenshot above).
- 11) Decide whether to **Recommend**, **Not Recommend** or **Cancel** the student's request. You should only cancel the request if the student asks you to i.e. they wish to withdraw the request.

This is a close-up of the decision confirmation section from the Scorecard. It features a red asterisk icon and the text '\* Please confirm your decision on the student's request.' Below this are three radio button options: 'Recommended', 'Not recommended', and 'Cancelled'. At the bottom of the section is a red 'Submit Review' button.

- 12) Click **Submit**.

13) Scroll down to see the request's **Review History**. If you are the second reviewer, this is where you'll see how the first reviewer completed the Scorecard.

**Review History** Outstanding Reviews

Review History Refresh

**2nd Review (PhD)** 09/12/2020, 16:33  
**#2 Pasha AA-Programme-Director**  
 Decision: Recommended

**Home Department Review (PhD)** 09/12/2020, 16:17  
**#1 Salma AA-Supervisor**  
 Decision: Recommended

**Decision**

Please confirm you or a relevant departmental colleague have discussed this request with the student including exploring alternative options  
 Yes

Please provide a departmental statement for RDSC review that outlines your comments on the application.  
 N/A

Please confirm your decision on the student's request  
 Recommended

### Navigating the Change of Circumstances App

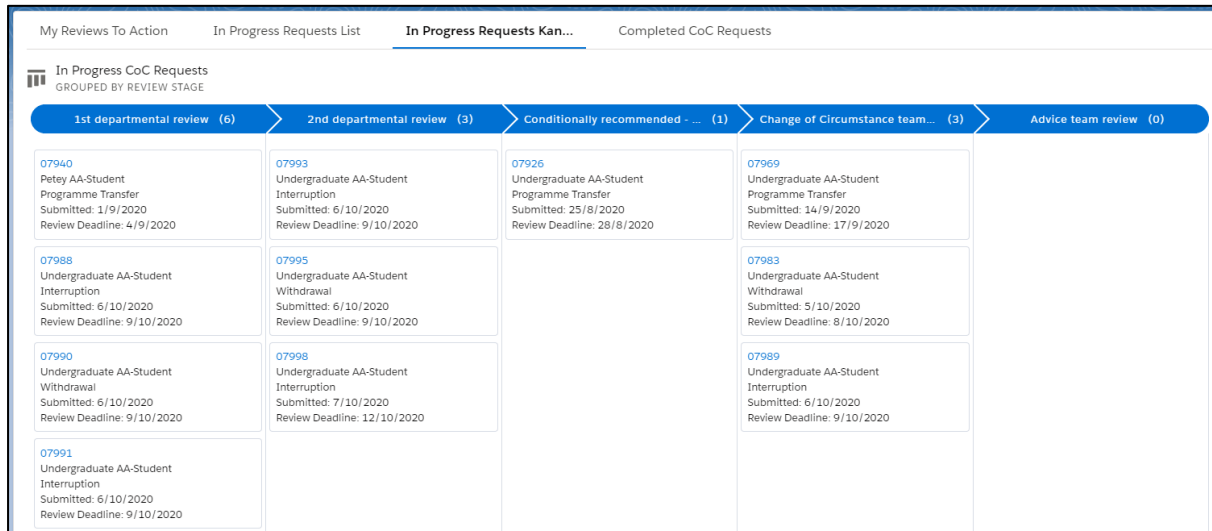
In the **Home** tab of the app, you'll see four ways of viewing the various requests associated with you:

- **My Reviews to Action:** a list of requests that have been assigned to you to make a decision on.
- **In Progress Requests List:** a list of all requests assigned to or shared with you which are at one of the review stages.
- **In Progress Requests Kanban:** as above, but displayed in groups to allow you to see at which review stage each request is in the process.
- **Completed CoC Requests:** a list of all requests assigned to or shared with you that have been completed – either by being approved by the PhD Academy, cancelled, or not approved at any stage.

Request	Requester	Review Type Name	Created Date	Decision
17136	Postgraduate Research AA-Student	Home Department Review (PhD)	09/12/2020 11:36	
17135	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	09/12/2020 11:16	
17133	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	09/12/2020 10:02	
17132	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	09/12/2020 09:24	
17131	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	09/12/2020 09:00	
17130	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	09/12/2020 08:47	
17114	Postgraduate Research AA-Student	Home Department Review (PhD)	07/12/2020 11:27	
17113	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	07/12/2020 10:45	
17112	Postgraduate Research AA-Student	1st Review: CSM	07/12/2020 09:45	
17086	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	05/12/2020 11:39	
17063	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	03/12/2020 19:49	

## An example Kanban

In the screenshot below, taken from the SSC Change of Circumstances app, it is clear that there are three requests at the *Change of Circumstances team* stage, four at the *1<sup>st</sup> departmental review* stage, and three at the *2<sup>nd</sup> departmental review* stage. The PhD Academy Kanban displays the same information for the relevant PhD Academy review stages.



## Support

If you encounter a technical error with Salesforce or you require technical support, please contact [ARD Systems](#).

If a Professional Services or Academic colleague requires access to Salesforce, please submit an [Access Request Form](#).