

How to Process a Programme Transfer Request

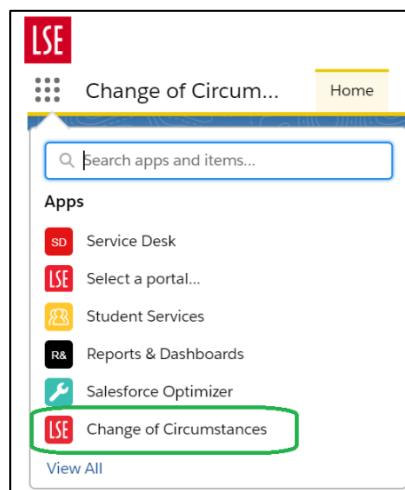
- 1) You will receive an email notification whenever a student, for whom you are the assigned First or Second academic approver, submits a Programme Transfer request. You can access Programme Transfer requests in two ways:

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		Completed CoC Requests	
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)
4 items - Sorted by Programme Enrolment ID - Updated 4 minutes ago

	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)
1 item - Updated 4 minutes ago

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

[All](#) [Submit Review](#)

Transfer details

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.

Scorecard

2nd Review (PhD)

Decision

① Please use this space to record any comments regarding the student's case and the rationale (including the consideration of any relevant evidence) for recommending or not recommending the request.

② Please state if departmental support for this request includes any conditions (e.g. course attendance, work plans, amendments to upgrade dates/requirements, etc).

③ *Please confirm your decision on the student's request.

Recommended

Not recommended

Cancelled

All

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

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.

③ *Please confirm your decision on the student's request.

Recommended

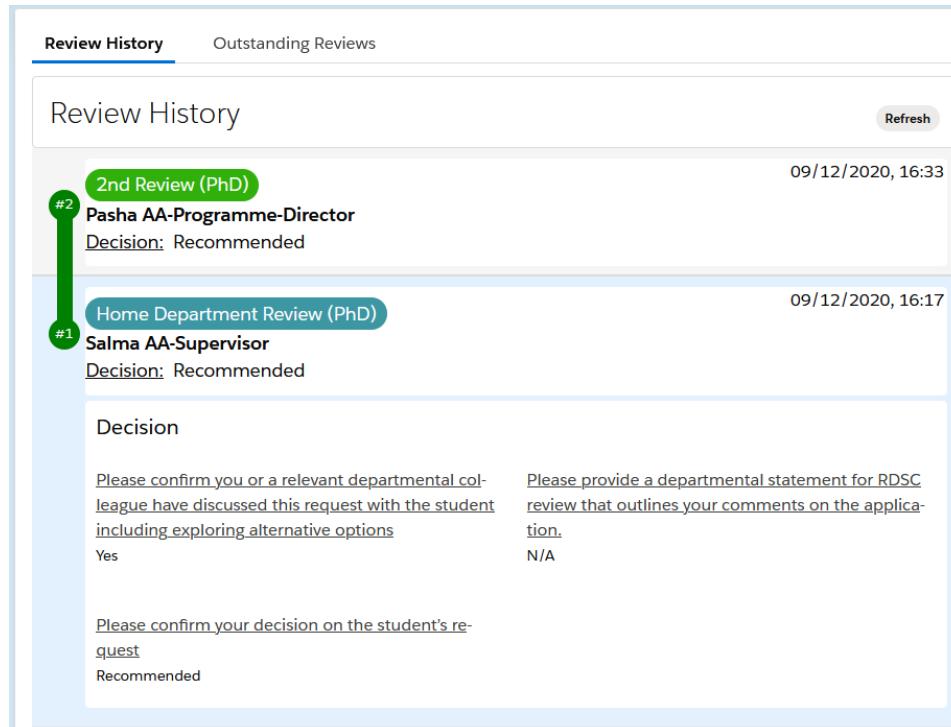
Not recommended

Cancelled

Submit Review

- 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.

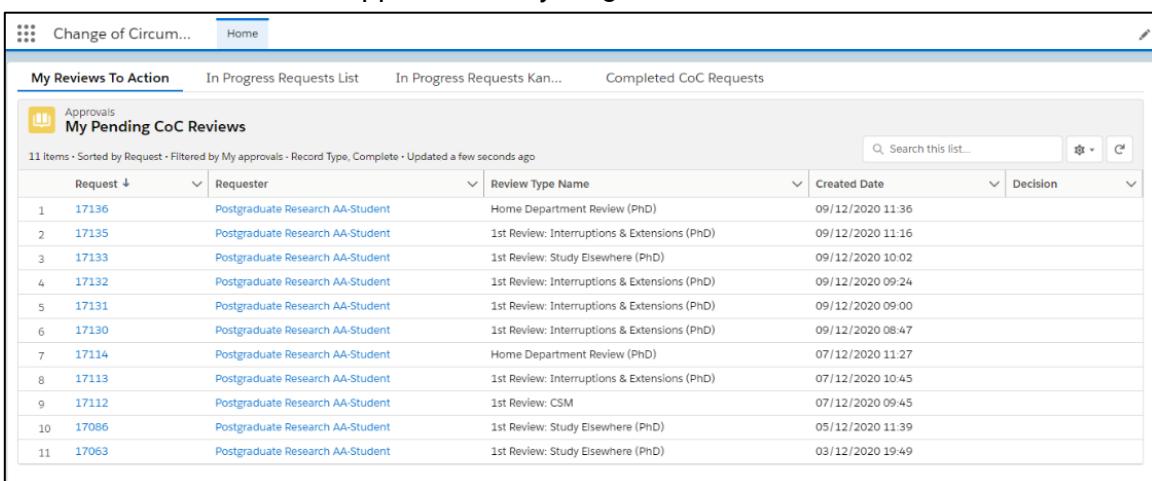


The screenshot shows the 'Review History' section of the app. It displays two review stages: '2nd Review (PhD)' and 'Home Department Review (PhD)'. Each stage is associated with a reviewer: 'Pasha AA-Programme-Director' and 'Salma AA-Supervisor' respectively. Both reviews show a 'Decision: Recommended'. The date and time for each review are also listed: '09/12/2020, 16:33' for the 2nd Review and '09/12/2020, 16:17' for the Home Department Review. A green arrow on the left indicates the flow from the first review to the second.

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.



The screenshot shows the 'My Reviews To Action' tab in the app. It displays a list of 'My Pending CoC Reviews' with 11 items. The table includes columns for Request ID, Requester, Review Type Name, Created Date, and Decision. The data is as follows:

Request	Requester	Review Type Name	Created Date	Decision
1 17136	Postgraduate Research AA-Student	Home Department Review (PhD)	09/12/2020 11:36	
2 17135	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	09/12/2020 11:16	
3 17133	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	09/12/2020 10:02	
4 17132	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	09/12/2020 09:24	
5 17131	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	09/12/2020 09:00	
6 17130	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	09/12/2020 08:47	
7 17114	Postgraduate Research AA-Student	Home Department Review (PhD)	07/12/2020 11:27	
8 17113	Postgraduate Research AA-Student	1st Review: Interruptions & Extensions (PhD)	07/12/2020 10:45	
9 17112	Postgraduate Research AA-Student	1st Review: CSM	07/12/2020 09:45	
10 17086	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	05/12/2020 11:39	
11 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 *1st departmental review* stage, and three at the *2nd departmental review* stage. The PhD Academy Kanban displays the same information for the relevant PhD Academy review stages.

My Reviews To Action	In Progress Requests List	In Progress Requests Kan...	Completed CoC Requests
In Progress CoC Requests GROUPED BY REVIEW STAGE			
1st departmental review (6) > 2nd departmental review (3) > Conditionally recommended - ... (1) > Change of Circumstance team ... (3) > Advice team review (0)			
07940 Petey AA-Student Programme Transfer Submitted: 1/9/2020 Review Deadline: 4/9/2020	07993 Undergraduate AA-Student Interruption Submitted: 6/10/2020 Review Deadline: 9/10/2020	07926 Undergraduate AA-Student Programme Transfer Submitted: 25/8/2020 Review Deadline: 28/8/2020	07969 Undergraduate AA-Student Programme Transfer Submitted: 14/9/2020 Review Deadline: 17/9/2020
07988 Undergraduate AA-Student Interruption Submitted: 6/10/2020 Review Deadline: 9/10/2020	07995 Undergraduate AA-Student Withdrawal Submitted: 6/10/2020 Review Deadline: 9/10/2020		07983 Undergraduate AA-Student Withdrawal Submitted: 5/10/2020 Review Deadline: 8/10/2020
07990 Undergraduate AA-Student Withdrawal Submitted: 6/10/2020 Review Deadline: 9/10/2020	07998 Undergraduate AA-Student Interruption Submitted: 7/10/2020 Review Deadline: 12/10/2020		07989 Undergraduate AA-Student Interruption Submitted: 6/10/2020 Review Deadline: 9/10/2020
07991 Undergraduate AA-Student Interruption Submitted: 6/10/2020 Review Deadline: 9/10/2020			

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](#).