

How to Process a Study Elsewhere Request

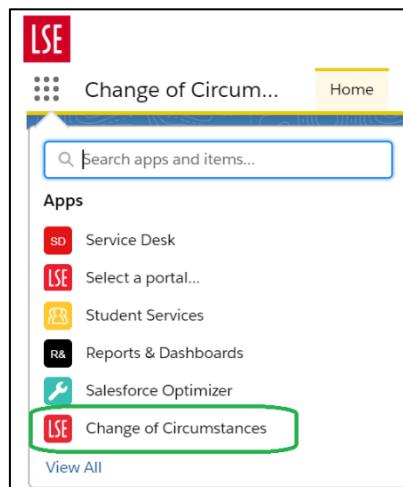
- 1) You will receive an email notification whenever a student, for whom you are the assigned First or Second academic approver, submits a Study Elsewhere request. You can access Study Elsewhere requests in two ways:

Accessing a Request via Email Notification

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

Access a Request via Salesforce Login

- a. To access the request form without using 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 selecting 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, select **View All** to view the full list.



- 2) You will see a dashboard called **My Reviews to Action**. To open a request, select 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		In Progress Requests List	In Progress Requests Kan...	Completed CoC Requests
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.

Request 17128

Contact Postgraduate Research AA-Student Type Study Elsewhere (PhD) Review Stage 1st departmental review Status Submitted - under review

Study Details Student Cases

Programme Enrolments for Parent Contact (4)
4 items - Sorted by Programme Enrolment ID • Updated 2 minutes ago

Programme ...	Year and Programme	Enrolment Status	Mode of attend...	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

Course Connections for Parent Contact (1)
1 item - Updated 2 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

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 selecting the file's title. You are also able to add your own files.

Files (1)

Add Files

Test for Upload PhD Academy
08-Dec-2020 • 11KB • docx

[View All](#)

5) 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

1st Review: Study Elsewhere (PhD)

Decision

*Please confirm you or a relevant departmental colleague have discussed this request with the student.

Yes
No

● 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.

*Please confirm the student is undertaking study in relation to their PhD research and that this form has been completed in accordance with LSE policy.

Yes
No

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

All Recommended

Have you been funded by
Student Loans Company

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 list the name and country of the institution(s) or organisation(s) where you will be studying.
Harvard University, USA

Please list the dates of departure and return for the location(s) where you will be studying.

6) Once you have reviewed the request, answer the questions on the left-hand side (yellow border in the screenshot above). 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.

* Please confirm your decision on the student's request

Recommended

Not recommended

Cancelled

Submit

7) Select **Submit**.

8) 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 08/12/2020, 16:10

1st Review: Study Elsewhere (PhD) #1 Salma AA-Supervisor Decision: Recommended

Decision

Please confirm you or a relevant departmental colleague have discussed this request with the student. Yes

Please confirm the student is undertaking study in relation to their PhD research and that this form has been completed in accordance with LSE policy. Yes

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
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.

Review Stage	Count
1st departmental review	6
2nd departmental review	3
Conditionally recommended - ...	1
Change of Circumstance team ...	3
Advice team review	0

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](#).