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:

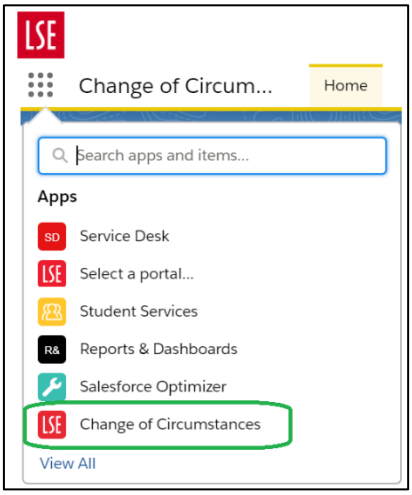
Accessing a Request via Email Notification

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.

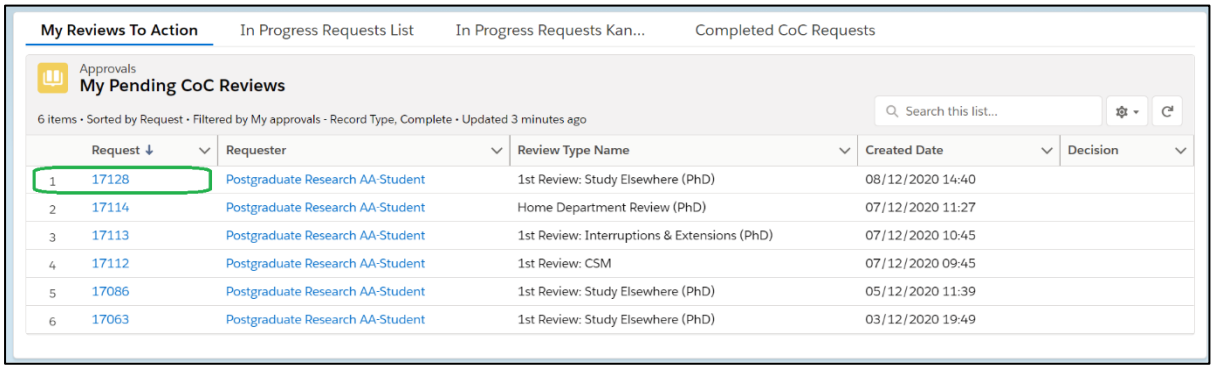
Access a Request via Salesforce Login

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.

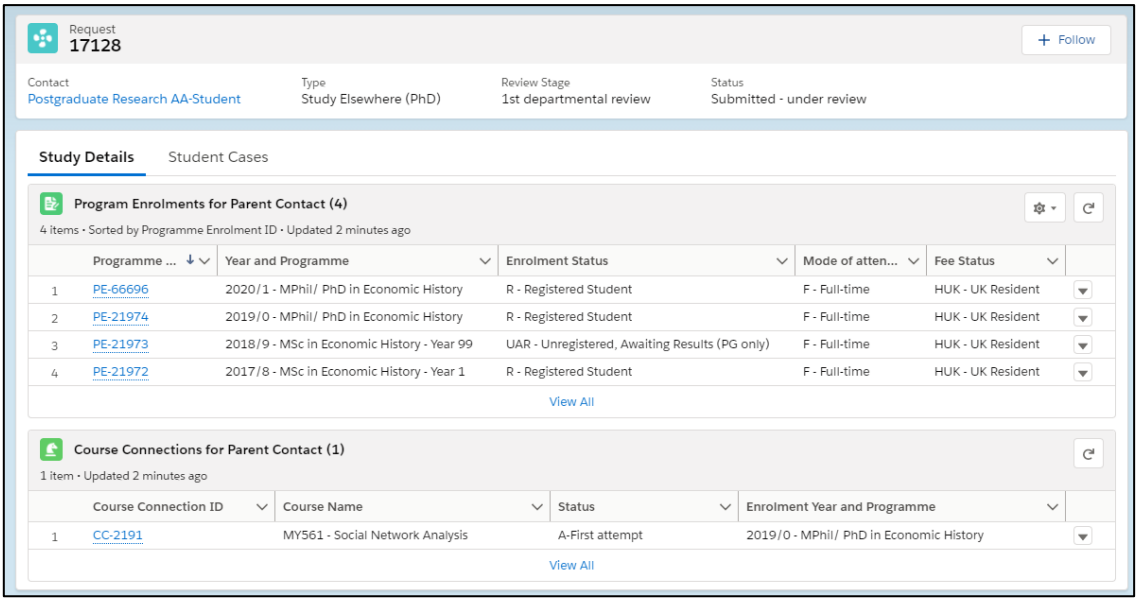


2) You will see a dashboard called **My Reviews to Action**. To open a request, select its blue number in the **Request Name** column under **My Pending Reviews**. An example is circled in green in the screenshot below.

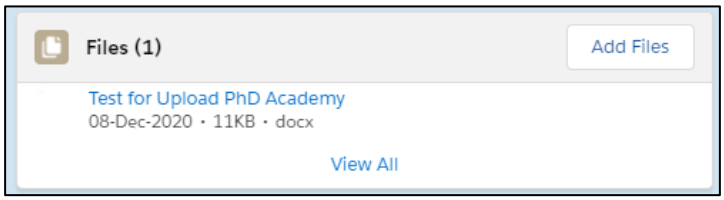


	Request	Requester	Review Type Name	Created Date	Decision
1	17128	Postgraduate Research AA-Student	1st Review: Study Elsewhere (PhD)	08/12/2020 14:40	
2	17114	Postgraduate Research AA-Student	Home Department Review (PhD)	07/12/2020 11:27	
3	17113	Postgraduate Research AA-Student	1st Review: Interruptions & 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	

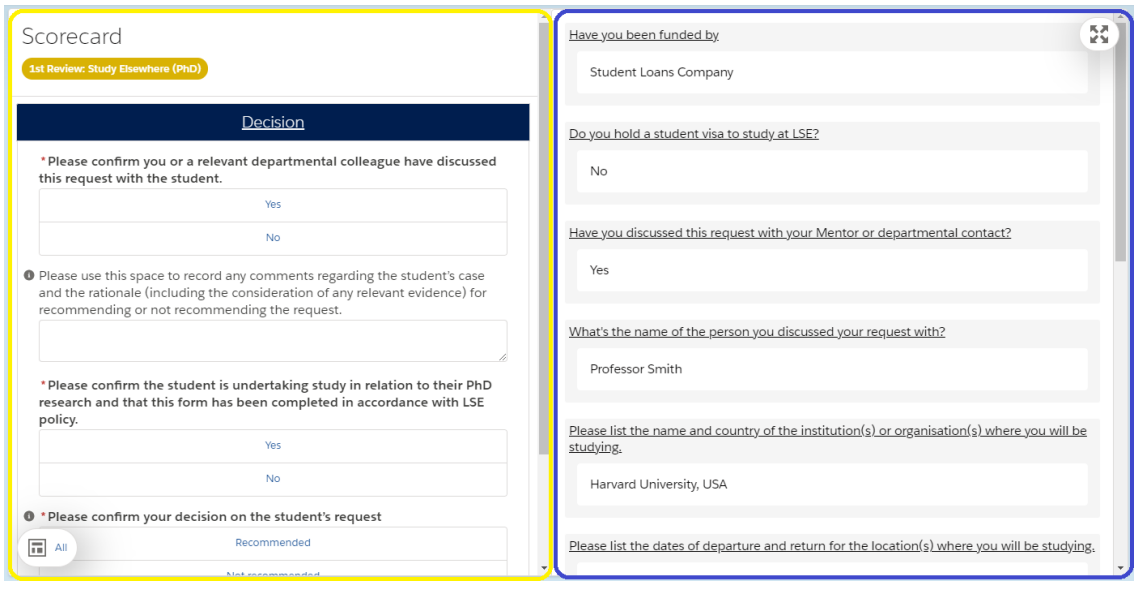
3) Check the **Study Details** section to ensure you are processing the correct student's request.



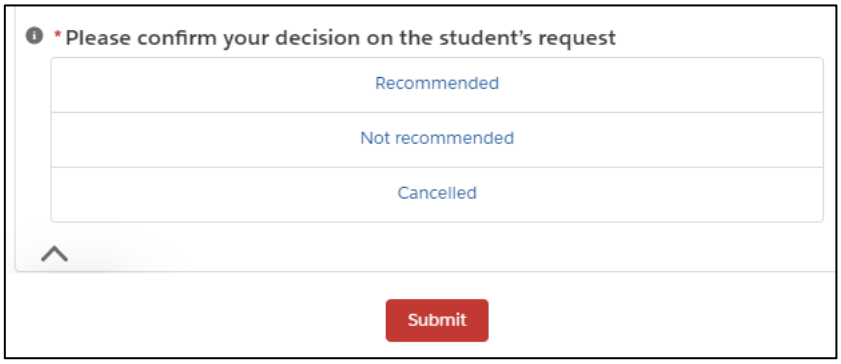
4) If the student has submitted any documentation to support their request, you'll see it under **Files**. You can view it without downloading by selecting the file's title. You are also able to add your own files.



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.

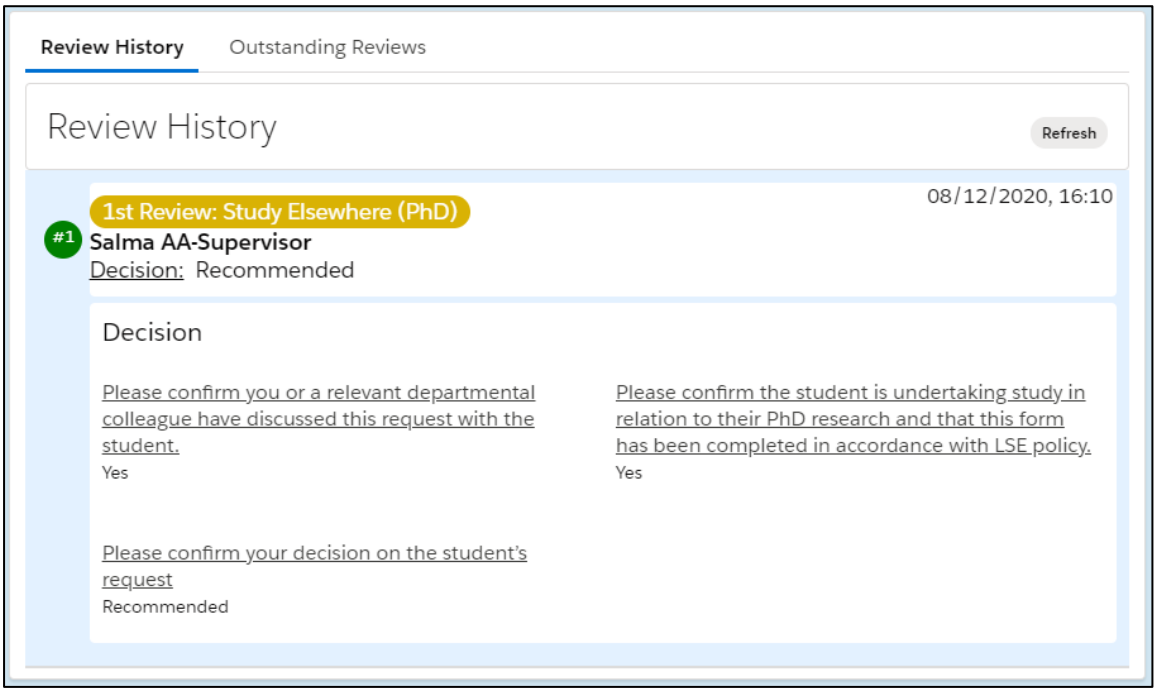


6) Once you have reviewed the request, answer the questions on the left-hand side (yellow border in the screenshot above). Decide whether to **Recommend, Not Recommend** or **Cancel** the student's request. You should only cancel the request if the student asks you to i.e. they wish to withdraw the request.



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.

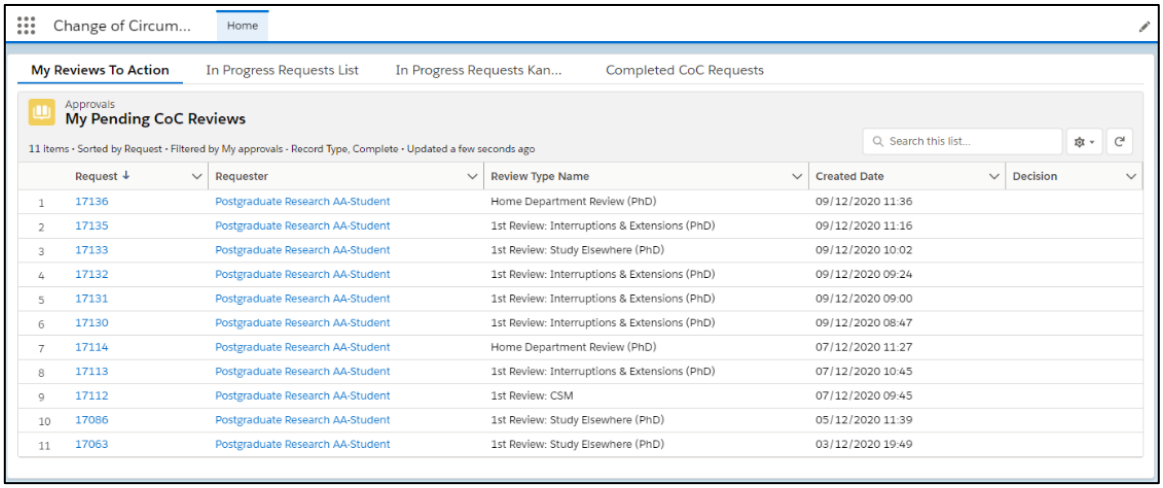


Navigating the Change of Circumstances App

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.

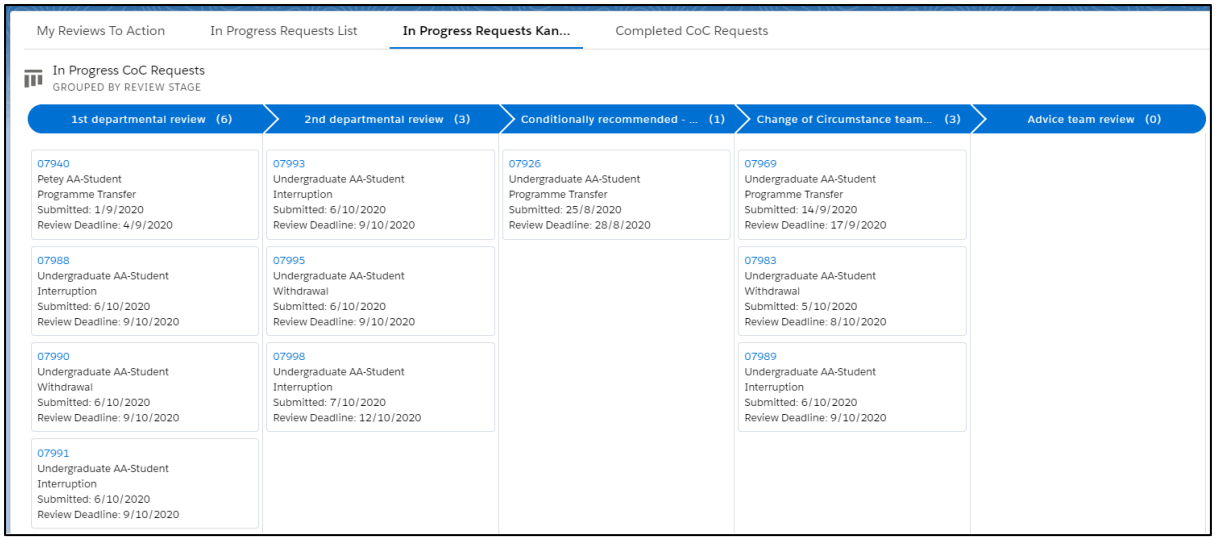
- **In Progress Requests Kanban**: as above, but displayed in groups to allow you to see at which review stage each request is in the process.
- **Completed CoC Requests**: a list of all requests assigned to or shared with you that have been completed – either by being approved by the PhD Academy, cancelled, 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.



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**.