# Change of Circumstances – Administrators' Guide

As a departmental administrator, you will have an overview of all Change of Circumstance (CoC) requests. You will also be able to assign and reassign users to different roles in the process.

Navigating the Change of Circumstances App

1. To access the Change of Circumstances app, **log in to Salesforce here** using your standard LSE login credentials.
2. Select the app launcher (9-dots symbol) on the left-hand side and select **Change of Circumstances.** If the app doesn't appear in the list, select **View All** to view the full list.
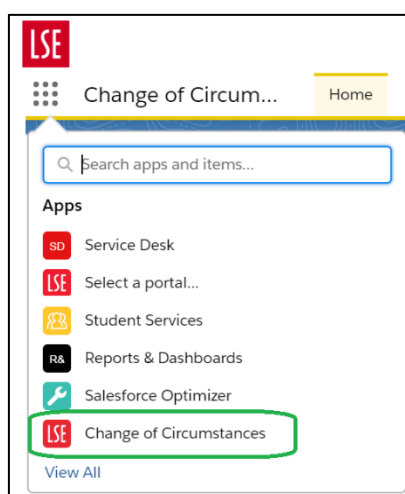
You will see four possible ways to view Change of Circumstance requests, and the default view will be **My Reviews to Action**. It's unlikely you'll see any requests here, because your role is unlikely to require you to process such requests.

3. Select a view.
   - **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 Change of Circumstances Team, cancelled, or not approved at any stage.

	Request Name ↑ ∨	Contact	Type	Review Stage	Created Date	Latest Due Date
1	07921	Postgraduate Taught AA-Student	Programme Transfer	Conditionally recommended - pending results	25/08/2020 15:49	28/08/2020
2	07926	Undergraduate AA-Student	Programme Transfer	Conditionally recommended - pending results	25/08/2020 17:12	28/08/2020
3	07932	Postgraduate Taught AA-Student	Withdrawal	1st departmental review	26/08/2020 13:43	02/09/2020
4	07940	Petey AA-Student	Programme Transfer	1st departmental review	01/09/2020 09:47	04/09/2020
5	07969	Undergraduate AA-Student	Programme Transfer	Change of Circumstance team review	14/09/2020 10:44	17/09/2020

4. To view an individual request, select its blue number in the **Request Name** column. An example is circled in green in the screenshot above.
5. Scroll to the bottom of the request to see its **Review History**. To see any additional comments each previous reviewer has made, select their decision.

Reassigning Reviewers

1. Scroll to the bottom of the review and select **Outstanding Reviews**.
2. Next to the review you wish to change, select **Edit**.

3. Remove the current owner for this review by selecting the **X symbol**.
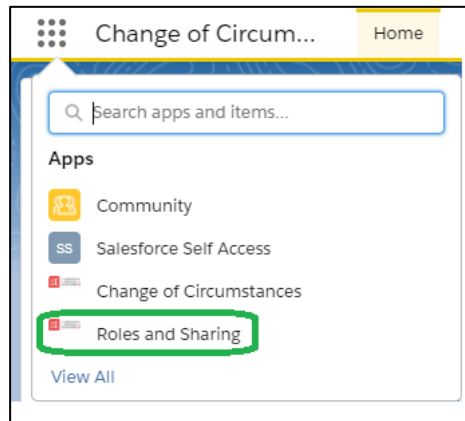

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4. Type the name of the member of staff who you would like to assign this review. Their name and email address should appear in a dropdown list. Select their name and select **Save** to assign them to this request.

Navigating the Roles and Sharing App

1. Select the app launcher (9-dots symbol) on the left-hand side and select **Roles and Sharing**.

2. When the page loads, you will see the Recently Viewed list of Roles. Select **Recently Viewed** and then **All Roles** from the list of list views.
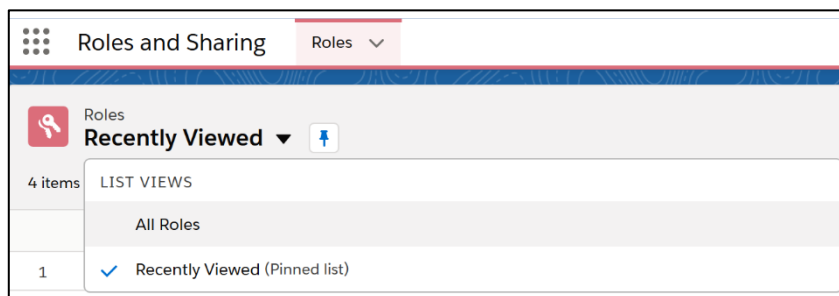
3. You will see a list of all the Roles that you have access to. Select the pin icon to pin the **All Roles** list view. Pinning it means that it will open by default in future, rather than opening 'Recently Viewed'.
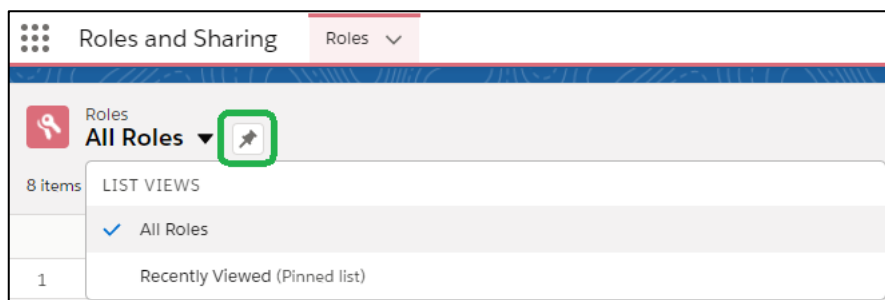
There are three different types of Role: Assignment, Notifications and Sharing.

- **Assignment Roles** are used for assigning ownership of something to a user. They will always return a single user for a given input. Assignment Roles are used to determine which user to assign ownership of 1st and 2nd departmental reviews for a given student's request.
- **Notifications Roles** are used for setting up users to receive notifications. They can return multiple users for a given input. Notifications Roles are used to determine who should receive optional notification emails for a given student's request.
- **Sharing Roles** are used for granting access to records in Salesforce. They can also return multiple users for a given input. Sharing Roles are used to grant access to individual students' requests, or to all requests within a specific parameter (i.e. Department, study level, specific programme).

View Users and Add Users to a Role Set

1. To see who is assigned to a particular role, select it.

On the screen that loads, you'll see two cards. In the left card you will see all the Role Sets that exist for the Role you have selected. On the right is some role-specific guidance. The **Activities** column tells you what each user can do within this role set.

In the screenshot below, every user listed under the Department of Anthropology Role Set will receive Optional Escalation Notifications as that is the Role being displayed. 'Departmental Administrator' is also able to manage the role set i.e. add and remove users to the role set.

NB: it is not possible to define the Role Sets from within this app. For example, if you decide you would like to change the default first reviewer for students on a particular programme, and that programme is not already listed as a Role Set, you should contact ARDS to request this configuration (see page 6).

2. To add a User to a Role Set, select **New** for the relevant Role Set and start typing the name of the user that wish to add.
3. When you have found the user you want, select them, then select **Save**.

Remove a User from a Role Set

1. To remove a user from a Role Set, select the dropdown next to the user and then select 'Delete'.

What each Role means

Role	Guidance
Change of Circumstances - 1st Reviewer	By default, Academic Mentors are the first reviewer for their mentees' change of circumstances requests (Primary Supervisor for research students). However, the 1st Reviewer role sets override the default behaviour so that the Assignee becomes the first reviewer instead, for the group of students described.
Change of Circumstances - 2nd Reviewer	By default, Departmental Tutors (UG) and Programme Directors (PGR) are the second reviewer for change of circumstances requests submitted by students on their programme(s).* However, the 2nd Reviewer role sets override the default behaviour so that the Assignee becomes the second reviewer instead for the group of students group described. *No PGT changes of circumstances processes have a 2nd review stage - they go straight to the SSC/PhD Academy after the 1st review is completed.
Change of Circumstances - Dept. Admin	Users who can view requests and reassign reviews to other users for the group of students described.
Change of Circumstances - Optional Decision Notification Recipients	Users who will receive a notification email when a final decision is made on a Change of Circumstances request.
Change of Circumstances - Optional Escalation Notification Recipients	Users who will receive a notification email when a departmental Change of Circumstances review has not been completed after 3 working days.
Change of Circumstances - Optional Programme Transfer Notification Recipients	Users in the *new* department who will receive a notification email when a Programme Transfer request has been supported by the student's home department.
Change of Circumstances - Optional Submission Notification Recipients	Users who will receive a notification email when a Change of Circumstances request is submitted.
Change of Circumstances - Programme Transfer Reviewer	By default, Departmental Tutors (UG) and Programme Directors (PGT and PGR) are the programme transfer reviewer for requests to transfer *into* their programme(s). However, the Programme Transfer Reviewer role sets override the default behaviour so that the Assignee becomes the Programme Transfer reviewer instead, for the group of students group described.

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.**