

## How to Process a Study Elsewhere Request

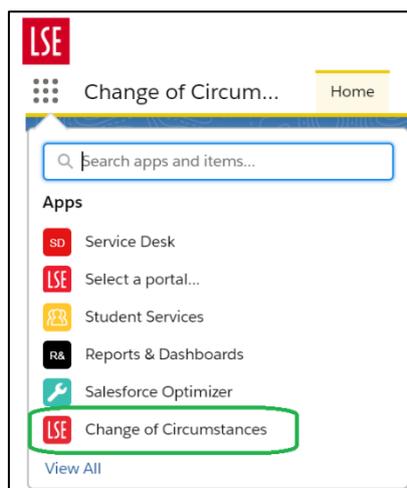
- 1) You will receive an email notification whenever a student, for whom you are the assigned First or Second academic approver, submits a Study Elsewhere request. You can access Study Elsewhere requests in two ways:

### Accessing a Request via Email Notification

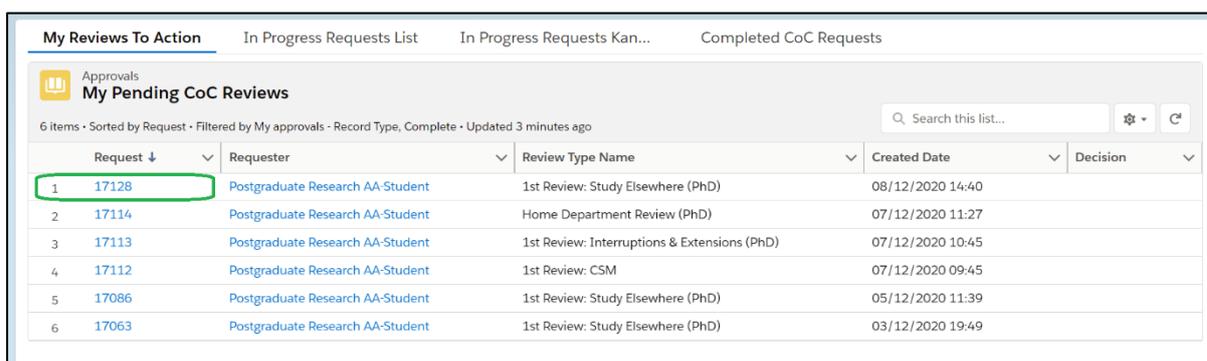
- a. When you receive an email notification, a clearly marked hyperlink to the request page will be included. Follow the link to directly access the request in Salesforce.

### 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.



The screenshot shows the 'My Reviews to Action' dashboard in Salesforce. The dashboard has tabs for 'In Progress Requests List', 'In Progress Requests Kan...', and 'Completed CoC Requests'. The main content area is titled 'My Pending CoC Reviews' and shows a table of 6 items. The first row of the table is circled in green.

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 + Follow

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

### Study Details Student Cases

**Program Enrolments for Parent Contact (4)** ⚙️ ↻

4 items - Sorted by Programme Enrolment ID - Updated 2 minutes ago

	Programme ...	Year and Programme	Enrolment Status	Mode of atten...	Fee Status
1	<a href="#">PE-66696</a>	2020/1 - MPhil/ PhD in Economic History	R - Registered Student	F - Full-time	HUK - UK Resident
2	<a href="#">PE-21974</a>	2019/0 - MPhil/ PhD in Economic History	R - Registered Student	F - Full-time	HUK - UK Resident
3	<a href="#">PE-21973</a>	2018/9 - MSc in Economic History - Year 99	UAR - Unregistered, Awaiting Results (PG only)	F - Full-time	HUK - UK Resident
4	<a href="#">PE-21972</a>	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 2 minutes ago

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

[View All](#)

- 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  
Not 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?

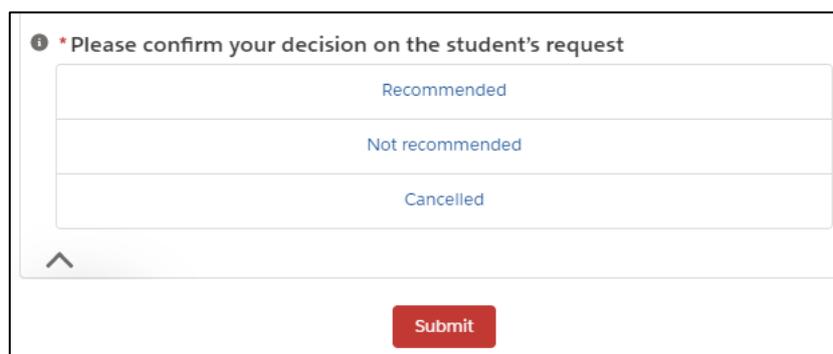
Professor Smith

Please list the name and country of the institution(s) or organisation(s) where you will be studying.

Harvard University, USA

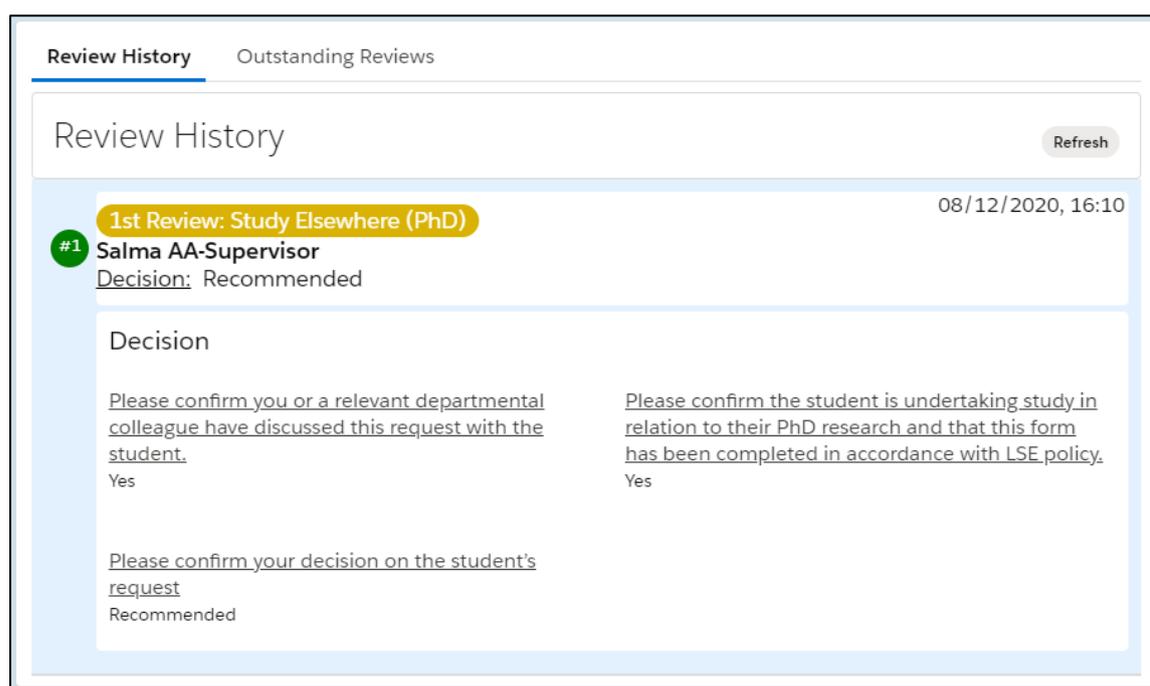
Please list the dates of departure and return for the location(s) where you will be studying.

- 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.



A screenshot of a web form titled "Please confirm your decision on the student's request". The form has three radio button options: "Recommended", "Not recommended", and "Cancelled". Below the options is a red "Submit" button. There is an upward-pointing arrow icon at the bottom left of the form area.

- 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.



A screenshot of the "Review History" section in an application. At the top, there are two tabs: "Review History" (selected) and "Outstanding Reviews". Below the tabs, the title "Review History" is displayed with a "Refresh" button on the right. The main content area shows a review entry for "1st Review: Study Elsewhere (PhD)" dated "08/12/2020, 16:10". The reviewer is identified as "#1 Salma AA-Supervisor" with a decision of "Recommended". The review content is displayed in a light blue box with a yellow border. It includes two questions: "Please confirm you or a relevant departmental colleague have discussed this request with the student." and "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." Both questions have a "Yes" response. At the bottom of the review box, it says "Please confirm your decision on the student's request" with a "Recommended" decision.

### 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 *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.

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	07998 Undergraduate AA-Student Interruption		07989 Undergraduate AA-Student Interruption	

### 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](#).