

Graduate Research (HDR) Scholarship Appointment Form HDR Administrator (RA) User Guide

The Scholarship Appointment Form (SAF) facilitates requests for new, replacement or top-up scholarships for new or existing students.

As a Faculty Research Administrator (RA), you can complete the online form in Salesforce to submit the request.

The information in this User Guide is fictitious and intended solely for demonstration.

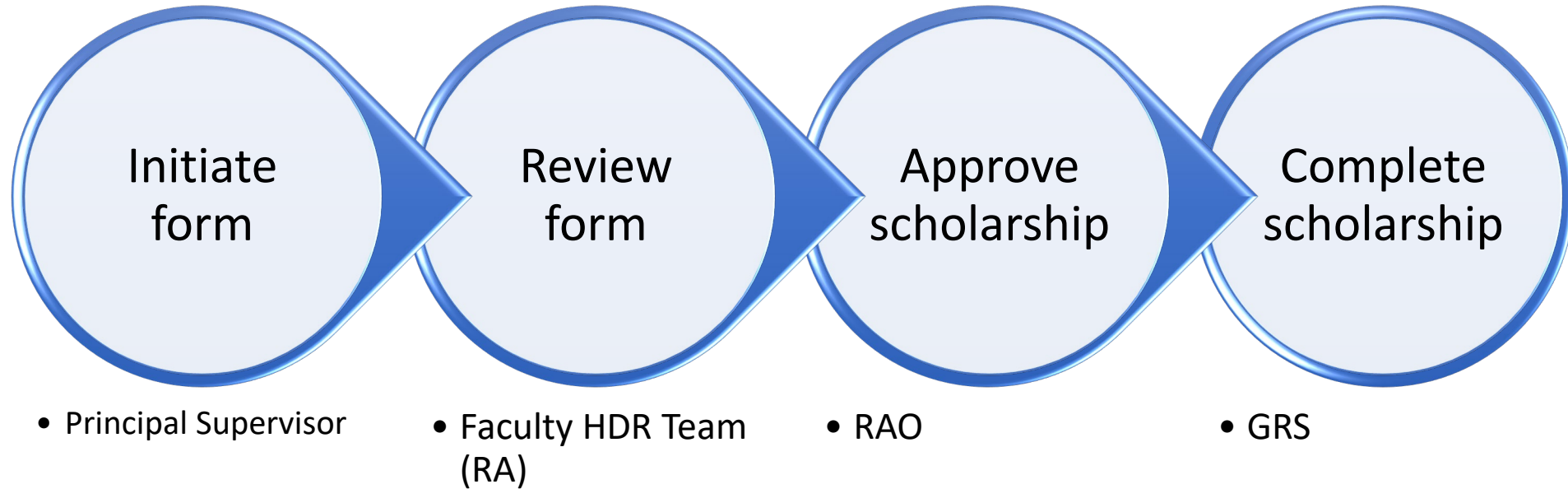
March 2024



Graduate Research (HDR) Scholarship Appointment Form HDR Research Administrator User Guide

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Scholarship Appointment Form Workflow



Graduate Research (HDR)
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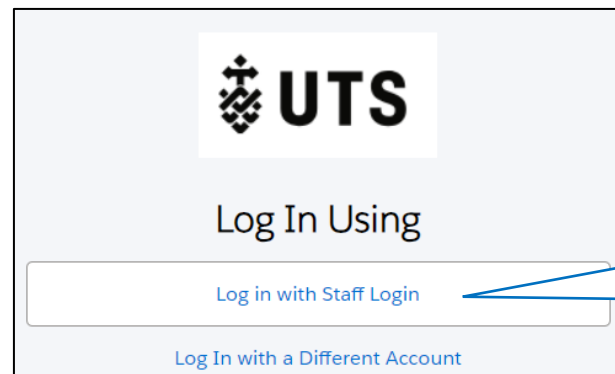
A. Initiating a scholarship appointment form

Step A1: Log onto Salesforce

Before commencing the form, please ensure that you have the following evidence/documents ready:

- Scholarship funding account details and written approval from the Account Holder, if you are not the Account Holder. You can use the Account Holder email template to contact them for the scholarship details.
- Funding conditions, if applicable.
- IP assignment or student deed, if applicable.

Go to Salesforce via this link <https://utsadmin.lightning.force.com/>



Click "Log in with Staff Login" and log into the usual UTS Okta way.

Step A1 Help

Unable to log into Salesforce? Log a ServiceConnect request to access Salesforce.

https://uts.service-now.com/serviceconnect?id=sc_cat_item&sys_id=053e847c87c7a9109a2f8407dabb35c8

* Select Salesforce instance:

Student Experience CRM (SECRM)

Special Consideration Access

UTS Open

Enterprise CRM

I am an existing Salesforce user and require additional permissions.

Student Experience CRM (SECRM) Instance

SECRM is the main Salesforce instance, it hosts a range of records and act assistance and more. The request will be sent to user's direct supervisor for

Request type:

Add Remove

Organisation Unit

Faculty of Engineering and Information Technology

Select your team:

Faculty of Engineering and Information Technology

* Faculty roles:

Faculty supervisor

a. Select "Student Experience".

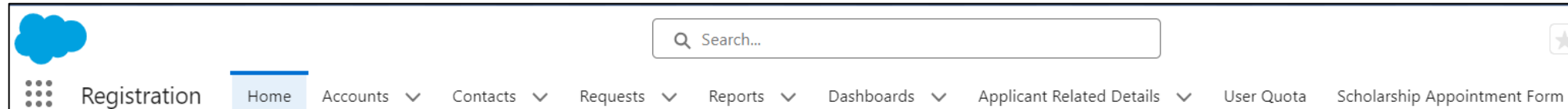
b. Select "Add".

c. Select your faculty and team.

d. Enter the role "Faculty supervisor".

e. Wait for the access request to be approved before logging into Salesforce. **Contact GRS if needed.**

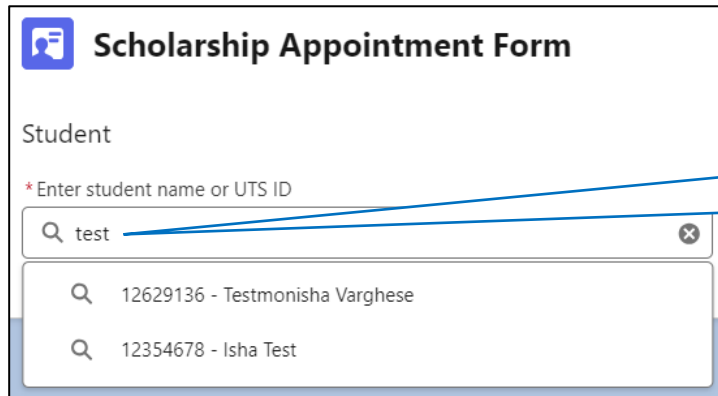
Step A2: Start the Scholarship Appointment Form (SAF)



You should see “Scholarship Appointment Form” (SAF) in the top right-hand corner. Click this menu item.

*Unable to see the “Scholarship Appointment Form”? Is the form blank after clicking on the item?
Follow Step 1 Help on the previous page to log a ServiceConnect request to access the form.*

Step A3: Select the student



Scholarship Appointment Form

Student

* Enter student name or UTS ID

test

- 12629136 - Testmonisha Varghese
- 12354678 - Isha Test

Enter the student's name or UTS Student ID.
A dropdown list of students will appear as you type.
Select the student from the list.

Help: Unable to find the student? [Contact GRS.](#)

Step A4: Select the course

Once the student is selected, the student details will appear.

Mandatory entries are marked with a red asterisk *.

Student details

First name: Testmonisha
Last name: Varghese
UTS ID: 12629136
Student liability: Local

Related course

* Course scholarship relates to

C02056 - PhD

Course details

Program full name: Doctor of Philosophy
Faculty: Science
Course type: Doctoral

Continue

a. Select the course related to the scholarship.

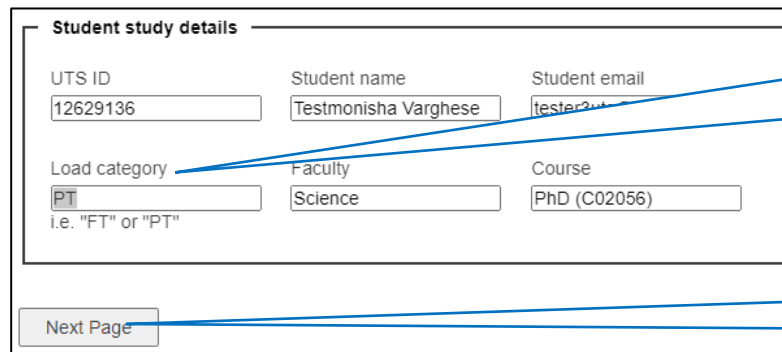
b. Click "Continue".

Help: Are the student details incorrect? **Contact GRS.**

Step A5: Select the scholarship load

Check the student details.

"Load category" is the only detail that can be changed here. All other details cannot be changed.



The screenshot shows a form titled "Student study details" with the following fields:

| | | |
|---|---|---|
| UTS ID | Student name | Student email |
| <input type="text" value="12629136"/> | <input type="text" value="Testmonisha Varghese"/> | <input type="text" value="tester2@uts.edu.au"/> |
| Load category <small>i.e. "FT" or "PT"</small> | Faculty | Course |
| <input type="text" value="PT"/> | <input type="text" value="Science"/> | <input type="text" value="PhD (C02056)"/> |

Below the form is a "Next Page" button. Blue callout boxes point to the "Load category" field and the "Next Page" button.

a. If the "Load category" is blank or incorrect, enter the "FT" for full-time or "PT" for part-time scholarship payment.

b. Click "Next Page".

*Help: Are the student details incorrect? **Contact GRS.***

Step A6: Enter scholarship details

1 of 2 - Scholarship

If you like to refer to the current RTPS conditions and stipend rates, please refer to our [UTS website](#).

Type of scholarship *

Top up/ One-off

Primary

Name of scholarship *

(will be reflected on offer letter)
e.g. Research Training Program, UTS Domestic/International, ARC Discovery/Linkage

Type of tenure *

New

Extension

Replacement

Extension past 3.5 years will only be considered for non-GRS or faculty funded stipends.

Stipend rate *

UTS stipend rate

Other amount

UTS stipend rates are annually revised by the Department of Education and Training. Rate for scholarships can be found on [UTS Scholarships website](#).

Indexed annually *

UTS stipend rate

No

UTS stipend rate is indexed annually. Scholarship recipients will be automatically paid the indexed rate year to year.

Primary scholarship payment duration *

Total duration of scholarship

Per annum

Usually provided with a UTS stipend rate which includes:
Extended sick leave (up to 84 days) Maternity leave (up to 84 days) Parenting leave (up to 20 days)

a. Is this a primary scholarship, a top-up or one-off scholarship?

b. Enter a scholarship name. This will be used on the student's scholarship offer letter.

c. Is this a new scholarship, or an extension or replacement for a current scholarship?

d. Is the rate equivalent to the UTS stipend rate, or is it different? Click "UTS Scholarships website" to check. If it differs, enter the amount in the pop-up box.

e. Does the rate increase annually, or remain constant each year?

f. Is the stipend a one-time total for the scholarship duration or an annual amount?

Step A6: Enter scholarship details cont.

Primary start date/ end date depends on commencement of study

Primary start date

Primary end date

Are there additional payable leave benefits? *

Yes
 No

Are there additional allowances? *

Yes
 No
(eg thesis allowance, relocation allowance)

Part-time award *

Allowed
 Not Allowed
Usually relating to exceptional circumstances e.g. primary carer, ongoing medical conditions, conditions for award

Is an IP-assignment/ student-deed required for this student? *

Yes
 No

Upload a copy of the certified student IP-assignment *

No file chosen

g. Tick this if the student has not commenced study and the start date is unknown.

h. Enter the start and end dates. You do not need to enter the dates if unknown (i.e. the above for 'g' is ticked). You can enter the funding duration in the "Funding details" (next section).

i. Does the scholarship offer additional payable leave benefits? If yes, enter details in the pop-up box.

j. Does the scholarship offer additional allowances? If yes, enter details in the pop-up box.

k. If the scholarship is offered full-time, is a part-time basis award allowed?

l. Does this scholarship have a student IP assignment or deed? If yes, attach a copy of the certified assignment below.

Step A6: Enter scholarship details (top-up/one-off) cont.

There are additional questions for top-up/one-off scholarships.

The image shows a portion of a web form for entering scholarship details. It includes three sections with callout boxes:

- Top-up payment duration ***
 - Per annum
 - Total duration
 - One off

Is the amount per annum, for the total duration or a one-off payment.
- Are the start and end date known ***
 - Yes
 - No

Start date *

End date *

Enter the start and end dates. You do not need to enter the dates if unknown (i.e. 'No' is selected). Instead, enter the funding duration in the "Funding details" section.
If the scholarship is one-off, enter the proposed payment date.
- Extension allowed ***
 - Yes (max 6 months)
 - No

Does the scholarship allow a payment extension?

Step A6: Enter scholarship details cont.

Find and select the research admin for this scholarship

enter your own name if you are the RA for this scholarship

Find and select the principal supervisor for this scholarship

enter your own name if you are the PS for this scholarship

Find and select the RAO for this scholarship

m. Enter the Faculty HDR RA. Enter and select your name if you are the RA/

n. Enter and select the principal supervisor.

o. Enter and select the RAO.

p. Check the details and click "Next Page".

Previous Page

Next Page

Step A7: Select number of scholarship funding sources

Prior to commencing the form, please ensure that you have the funding sources information ready.

Scholarship Appointment Form

2 of 2 - Funding

First, select how many funding records you wish to add at this time. You can add another funding request later.

Please identify if the funds are from one of the following funding sources, and specify the details.

Faculty/Institute is responsible for ensuring that there is sufficient funding available in the nominated grant account for the duration of the scholarship

How many funding records do you wish to create related to this Scholarship?

Please select... ▼

Please select...

1

2

3

Previous Page Submit

a. Select the number of funding sources for the scholarship.

b. Click "Submit" to display the funding details for entry.

Step A8: Enter scholarship funding details

Funding 1

Funding source *

Internal (e.g. CRB/Faculty/Institute/Centres)

External (e.g. ARC/NHMRC/Other External Funder/Industry Doctorate Program)

Government (e.g. Commonwealth Department of Education and Training)

CRB = UTS Central Research Budget
ARC = Australian Research Council
NHMRC = National Health and Medical Research Council

Funding source details *

Funding duration *

RES code

Leave blank if faculty accounts

RM code

Leave blank if faculty accounts

Accounting string to fund payments *

Type "unknown" if CRB funded. Preferred formatting is: *OrgUnit. Location. Activity. NaturalAccount*

c. How is the scholarship funded?

- internally with UTS internal funds
- externally by external funding bodies or grants
- by Commonwealth or state government funds

Enter the funding details in the box below, e.g. ARC Discovery Grant.

d. Enter the funding duration and specify the metrics in years or months.

e. This is optional. Enter the TRIM/Content Manager RES code if known.

f. Enter the ResearchMaster project code, e.g. PROxx-xxxx, if the scholarship is funded by a project.

g. Enter the UTS account details of the funding source. The Account Holder or the Faculty Finance team can provide this.

Step A8: Enter scholarship funding details cont.

Find the account holder for this funding

enter your name if you are the Account Holder for this funding

Can't find who you're looking for?

Enter UTS email of the account holder here *

I confirm that I have received the account holders approval for this funding

Yes

Please attach the account holders approval for this funding record

No file chosen

As the funding source is external, please upload funding conditions *

No file chosen
(Excludes ARC funding)

h. Enter and select the Account Holder.
If the Account Holder is not on the list, tick the box below and enter the Account Holder's UTS email address.

i. Tick to confirm the Account Holder's approval and attach the approval document.
You can use the Account Holder email template to contact them for the scholarship details. Save the email as a PDF and attach it to the record.

j. Attach the funding conditions document for an external funding source.

k. Complete the details of all funding sources and check them.
Click "Submit". This is the last step of the Scholarship Appointment Form.

Step A9: Confirmation of submitted scholarship application

- After submitting the scholarship appointment form, you will be directed to the scholarship request details on Salesforce.
- A PDF is generated upon the initial completion and submission of the scholarship appointment form.
- You can
 - Change or add details to the scholarship request.
 - Send it to the RAO for approval.
- Other options (not included in this user guide)
 - Send it to the Principal Supervisor to request more information or review. The Principal Supervisor must have a Salesforce account and is listed in the Scholarship Details.
 - Send it to the Account Holders to request more information or review. The Account Holders must have a Salesforce account and are listed in the Scholarship Details.

Step A10: Scholarship request details – an overview

The screenshot displays a user interface for managing scholarship requests. It is divided into several sections:

- Top Left:** A communication area with a greeting "Hi Elizabeth," instructions on how to use the flow, and options to assign the request to a Principal Supervisor or RAO. The "Assign to RAO" option is selected. A text input field for a message and a "Next" button are also present.
- Top Right:** A navigation menu with links for "Scholarship Details - RA to Scholarships" and "Funding Details 1".
- Middle Right:** An "Attachments (1)" section showing a PDF document titled "Scholarship Appointment PDF" with a date of 29/02/2024 and a size of 49KB.
- Bottom Right:** A communication section with "Post" and "Email" tabs, a "Share an update..." input field, and a "Share" button. Below this is a "Most Recent Activity" section with a search bar and icons for refresh and share.
- Bottom Left:** A "Details" section with tabs for "Details" and "History". It contains two main categories: "Case Information" and "Assessment".

Callout boxes provide the following descriptions:

- "Send the form to the RAO for approval." points to the "Assign to RAO" radio button.
- "Change the scholarship details." points to the "Scholarship Details - RA to Scholarships" link.
- "Change the funding details." points to the "Funding Details 1" link.
- "Attach additional documents." points to the PDF attachment.
- "PDF of the captured details." points to the PDF attachment.
- "Add/change the RAO." points to the "RAO for approval" field, which shows "Christina Oh".
- "Change the load category." points to the "Load Category" field, which shows "Part Time".
- "View workflow and communications." points to the "Most Recent Activity" section.

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B. Changing the details of a scholarship appointment form

Step B1: Changing the load category

Details History

Case Information

Request Number: 03497392

Request Owner: Elizabeth Ng

Status: Faculty

Load Category: Part Time

A pencil icon is visible next to the 'Load Category' field.

a. Click the pencil.

Load Category

Part Time

--None--

Full Time

✓ Part Time

ALL

Not entered

Outcome Comments

Cancel Save

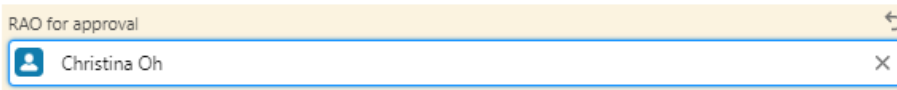
b. Select Full Time or Part Time on the dropdown menu.

c. Click "Save" to save the changes or "Cancel" to discard the changes.

Step B2: Adding or changing the RAO



a. Click the pencil.

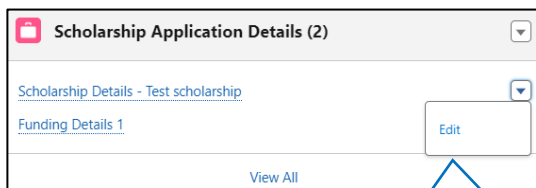


b. Click the "X" to remove the name. Select the RAO.



c. Click "Save" to save the changes or "Cancel" to discard the changes.

Step B3: Changing the scholarship details



a. Click the down arrow and "Edit" next to Scholarship Details. A window will pop up.

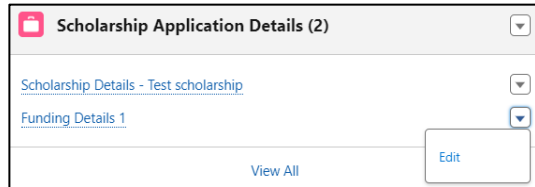
b. Change the relevant information in the Scholarship Details section. **Do not change the bottom Form Details section.**

A screenshot of the "Edit Scholarship Details - Test scholarship" form. The form is divided into two columns. The left column contains dropdown menus for "Type of Scholarship" (Primary Scholarship), "Type of Tenure" (New), "Stipend Rate" (RTPS Rate), "Primary Scholarship Payment Duration" (Per Annum), "Additional Payable Leave Benefits" (No), "Additional Allowances" (Yes), "Top Up Payment Duration" (--None--), "Are start date and end date known" (--None--), "Start Date", "End Date", and "Primary Scholarship dates". The right column contains text input fields for "Name of Scholarship" (Test scholarship), "Research Admin (RA)" (Christina Oh), "Principal Supervisor" (Elizabeth Ng), "Other Amount", "Indexed annually" (RTPS Rate), "Additional Allowances Details", "Leave Benefits Detail", "Extension Allowed" (Yes (max 6 months)), "Proposed date of payment", and "Duration (months)". At the bottom, there are "Cancel", "Save & New", and "Save" buttons. A legend indicates that an asterisk (*) denotes required information.

c. Click "Save" to save the changes or "Cancel" to discard the changes. **Do not click "Save & New"**. If you accidentally clicked "Save & New", close the pop-up window, click "Edit" the form again and ensure the changes were saved.

Help: Clicked on the filename instead of "Edit"? Click the browser's back button to return to the scholarship overview.

Step B4: Changing the funding details



a. Click the down arrow and “Edit” next to relevant Funding Details. There may be more than one Funding Details in this scholarship. A form will pop up.

b. Make the relevant changes in the Funding Details section. **Do not make changes in the bottom Form Details section.**

Edit Funding Details 1

* = Required Information

Funding Details

Funding Source: External

Funding duration: 3.5 years

Funding Source Details: ARC funding

Accounting String to fund payments: unknown

RES:

RM code:

Account Holder Approval: Yes

External account holder email:

Form Details

* Scholarship Application Details Name: Funding Details 1

* Required: Save

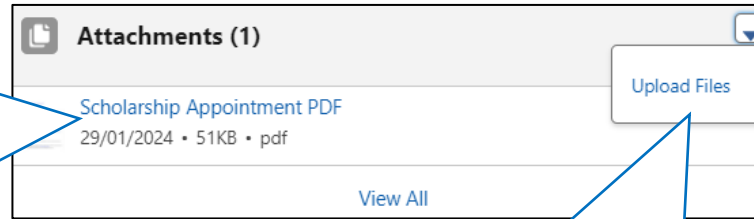
Cancel Save & New

c. Click “Save” to save the changes or “Cancel” to discard the changes. **Do not click “Save & New”.**

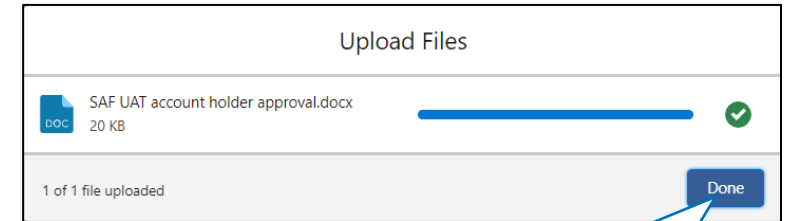
Help: Clicked on the filename instead of “Edit”? Click the browser’s back button to return to the scholarship overview.

Step B5: Attaching additional documents

A PDF is generated upon the initial completion and submission of the scholarship appointment form. This PDF document will not reflect the details that were changed after the initial submission.



a. Click the down arrow and “Upload Files”. Attach the relevant document as usual.



b. Click “Done” when the upload is completed. The document will appear in the Attachments list.

Step C: Creating a new PDF of the scholarship form



A new PDF can be generated using “Create PDF” (top-right corner) to reflect the most up-to-date information. The latest PDF will appear on the top of the Attachments list.

Step D: Sending the scholarship form for RAO's approval

Use this flow to assign the scholarship request to the Principal Supervisor or RAO.

You can also view the account holders who are yet to provide approval and send a reminder.

What would you like to do?

Assign to Principal Supervisor

Assign to RAO

Contact Account Holders

Enter your message below

[Next](#)

a. Select "Assign to RAO" and enter a message for the RAO in the box below. The RAO must be listed in the scholarship request details.

b. Click "Next".

This scholarship request has been assigned to the RAO with your comments.

You can close this page.

Have a nice day!

[Previous](#) [Finish](#)

c. Click "Finish" or close the browser or browser tab. The RAO will review the changes and either approve and send it to GRS or return it to you to request for more information.

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E. Responding to RAO's/GRS's comments

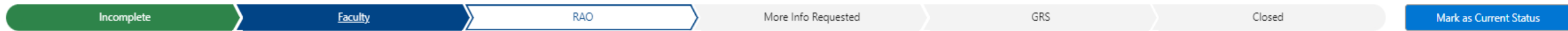
Step E: Responding to RAO's/GRS's comments

- After reviewing the scholarship request, the RAO or GRS may return it to you and ask for more information.
- [Change the details of a scholarship appointment form](#) accordingly and assign it to RAO for their review.
- Scholarship requests returned by GRS will need to be reassigned to the RAO for review before the RAO sends them to GRS.

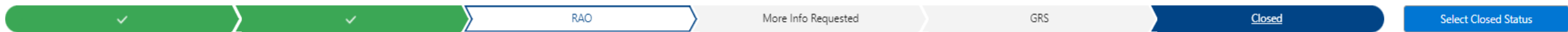
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F. *Withdrawing/cancelling a scholarship request*

Step F: Withdrawing/cancelling a scholarship request



a. Click "Closed".



b. Click "Select Closed Status".

A screenshot of a dialog box titled 'Close This Request'. It contains a dropdown menu labeled '*Status' with the text 'Select a closed stage...' and a list of options: 'Cancelled', 'Successful', and 'Unsuccessful'. A blue arrow points from the 'Cancelled' option to the right.

c. Select "Cancelled".

Do not select "Successful" or "Unsuccessful". These are used by GRS only for scholarships that are not withdrawn or cancelled.

d. Click "Save" to confirm the cancellation of the scholarship. Click "Cancel" to discard the cancellation. You should return the scholarship to the workflow status by clicking on the original status.

If the scholarship request is with GRS, do not cancel the request. Notify GRS separately.

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G. Viewing scholarship requests through list views/reports

Step G1: Viewing scholarship requests through list views



a. Click "Requests".

b. Click the down arrow and search for "GRS Scholarship Requests – faculty x", where "faculty x" is your faculty name.



c. Click the pin to bookmark this report for future use.

| Request N... | Faculty | Status | Owner Name | UTS ID | Contact Name | Course | Load Cate... | Created B... | Date/Time Opened | Last Mo... | Last Modified Date |
|--------------|--|---------|-------------|----------|--------------|---------|--------------|---------------------|---------------------|------------|---------------------|
| 01407206 | Engineering and Information Technology | Faculty | Rekha Patra | 12354578 | Jake Test | MSc(Ed) | Full Time | 27/02/2024 11:50 am | 27/02/2024 11:50 am | | 27/02/2024 11:50 am |

d. Click the request number to view the details of the specific scholarship request.

Click the field name (not the down arrow) to sort the list by that field.

Step G2: Viewing scholarship requests through reports



a. Click "Reports".

| REPORTS | Report Name |
|-----------------|---|
| Recent | GRS Scholarship by Status |
| Created by Me | GRS Scholarships by Faculty |
| Printed Reports | GRS Scholarship by Type |

b. You will see three sets of scholarship reports based on groupings. Click the desired report. You will see the requests in your faculty only.

| Status ↑ ▾ | Request Number ▾ | Contact Name: Full Name ▾ | UTS ID ▾ | Faculty ▾ | Course ▾ | Load Category ▾ | RAO for approval: Full Name ▾ | RAO Comments ▾ | Account Holder: Full Name ▾ | Account Holder Approval ▾ | Date/Time Opened ▾ | Created By: Full Name |
|-------------------|------------------|---------------------------|----------|--|----------------|-----------------|-------------------------------|----------------|-----------------------------|---------------------------|--------------------|-----------------------|
| Open Info Request | 03487343 | Tatiana Ibañez | 12620126 | Engineering and Information Technology | ME(Res)/CO2017 | Full Time | Challey McGuire | | Elizabeth No | Yes | 4/01/2024 12:01 AM | Oliver Wu |

c. Click the request number to view the details of the specific scholarship request.

Click the field name (not the down arrow) to sort the list by that field.