

# Graduate Research (HDR) Scholarship Appointment Form Principal Supervisor User Guide

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

As a Principal Supervisor within FEIT, you can complete the online form in Salesforce to submit the request.

For scholarship requests in all other faculties, kindly reach out to the Faculty HDR Officer/Team to initiate the request.

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

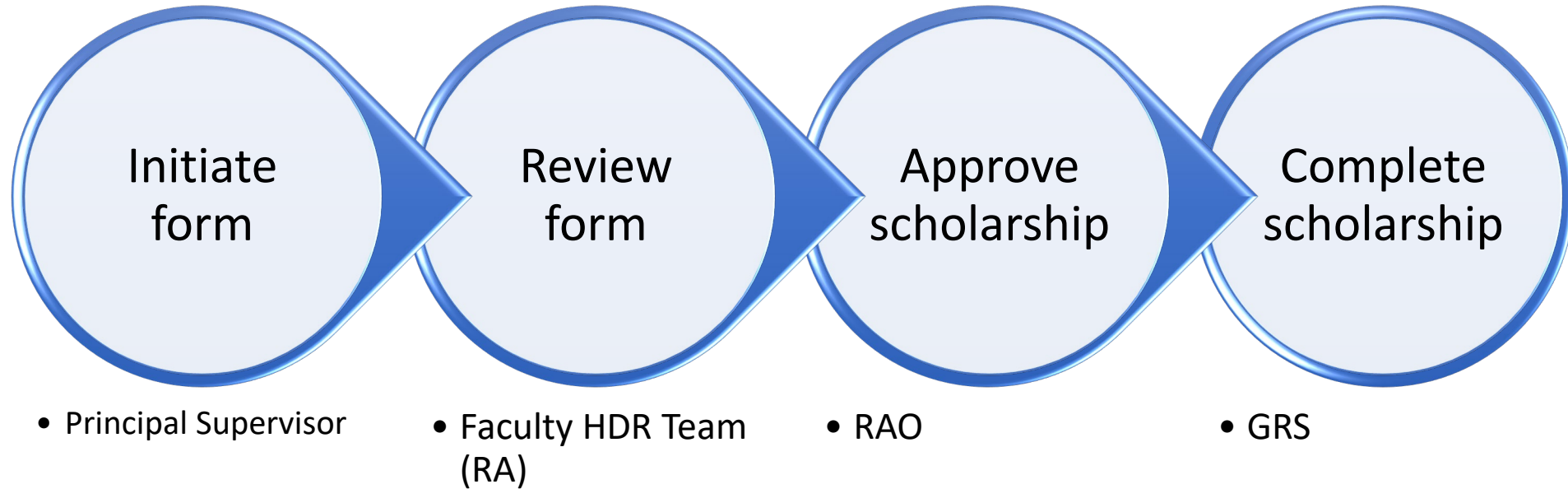
*March 2024*



# Graduate Research (HDR) Scholarship Appointment Form Principal Supervisor User Guide

- A. [Initiating and submitting a scholarship appointment form](#)
- B. [Responding to the Faculty HDR Team's \(RA\) comments](#)

# Scholarship Appointment Form Workflow



Graduate Research (HDR)  
Scholarship Appointment Form  
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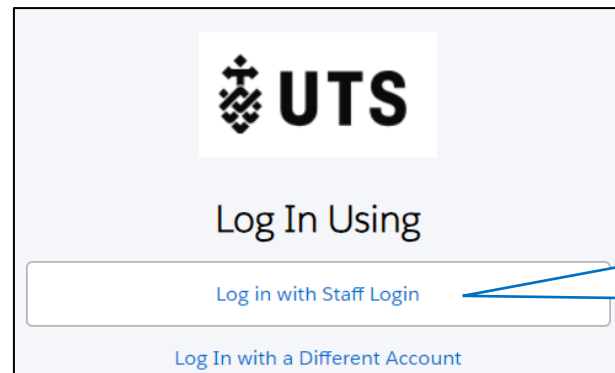
A. Initiating and submitting a scholarship appointment form

# 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](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 assistance and more. The request will be sent to user's 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".

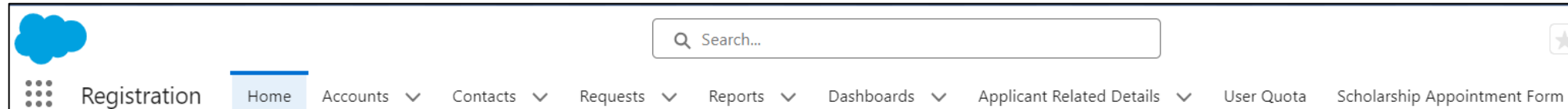
b. Select "Add".

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 the Faculty HDR Team if needed.

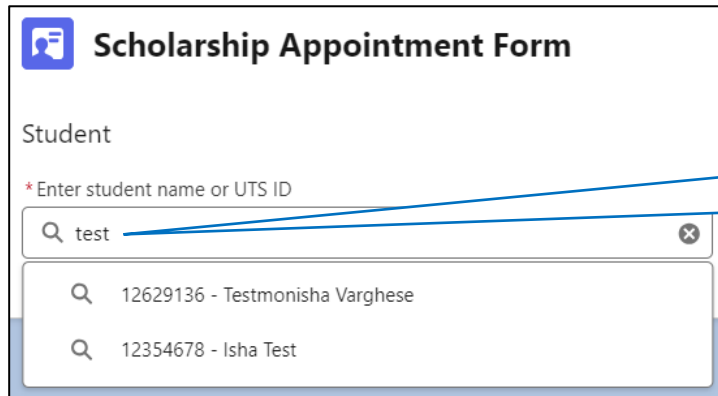
# Step A2: Start the Scholarship Appointment Form (SAF)



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 the Faculty HDR Team.*



# 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 the Faculty HDR Team.*

# 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)"/>

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

Callout b: b. Click "Next Page".

Next Page

*Help: Are the student details incorrect? Contact the Faculty HDR Team.*

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

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

Callout: 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 \*

Callout: Enter the start and end dates. If unknown, i.e. 'No' is selected, dates are not needed. In this case, enter the funding duration in the "Funding details" section. If the scholarship is a one-off, enter the proposed payment date.
- Extension allowed \***
  - Yes (max 6 months)
  - No

Callout: 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

Previous Page

Next Page

m. For FEIT, enter and select "Christina Oh". All FEIT Faculty HDR Team members can access the submitted form.

n. Enter your name and select it.

o. Enter the RAO of your school, if known. Otherwise, leave it blank and the FEIT HDR Research Officer/Team will enter it.

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

# Step A7: Select the 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 the 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.  
If the scholarship is one-off, enter "one-off".

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 would be able to provide this.



# Step A8: Enter the 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 you are the Account Holder, enter your name.  
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. If you are the Account Holder, do not tick this box.  
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.
- The Faculty HDR Team will review the scholarship request.
- If the Faculty HDR Team needs more information from you, they will return the form to you for comments and/or amendments and you will receive an email notification. Follow these steps to [respond to the Faculty HDR Team's \(RA\) comments](#).

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B. Responding to the Faculty HDR Team's (RA) comments

# Step B1: Received email notification

- If the Faculty HDR Team needs more information about the scholarship, you will receive an email (as per below) requesting you review a scholarship appointment form.
- Note the **bolded comments** in the email and click the link to go to the scholarship form on Salesforce.
- You may need to log in before accessing the scholarship form. Follow [Step A1](#) at the top of this user guide.

You have a new Scholarship Application for Student ID: 12629136 that requires your review.

Please access Salesforce to review and process Application [#03497392](#)

Additional comments may have been added here:

**more info**

Your review is the next step in the workflow and the application cannot proceed further until you have reviewed it.

If you require assistance with the processing of this application, please liaise the Graduate Research School.

# Step B2: Changing the scholarship details – an overview

Depending on the RA's request, you can edit the scholarship details in different sections.

The screenshot displays a scholarship application management interface. On the left, a 'Details' tab is active, showing 'Case Information' with fields for Request Number (03497392), Status (Faculty), Request Owner (Elizabeth Ng), and Load Category (Part Time). A 'Next' button is visible. On the right, a sidebar contains sections for 'Scholarship Application Details (2)', 'Attachments (1)', and a communication feed. Callouts point to various elements: 'Respond to the RA with a comment.' points to the top text area; 'Change the scholarship details.' points to the 'Scholarship Details - Test scholarship' link; 'Change the funding details.' points to the 'Funding Details 1' link; 'Attach additional documents.' points to the 'Attachments (1)' section; 'Change the load category.' points to the 'Part Time' field; and 'View workflow and communications.' points to the bottom of the communication feed.

Thank you for creating a HDR scholarship request.

You can use this screen to send a message to the RA, or view the RA's request and the account holders who are yet to provide approval and send a reminder.

If you are the account holder, or wish to attach evidence of external funding, please go to relevant funding record (on the right column of this page) to do so.

**Who would you like to contact?**

Research Admin (RA)

Account Holders

Next

**Details** History

Case Information

Request Number: 03497392

Status: Faculty

Request Owner: Elizabeth Ng

Load Category: Part Time

Assessment

Scholarship Application Details (2)

Scholarship Details - Test scholarship

Funding Details 1

View All

Attachments (1)

Scholarship Appointment PDF

29/02/2024 • 49KB • pdf

View All

Post | Email

Share an update...

Share

Most Recent Activity

Search this feed...

View workflow and communications.

Respond to the RA with a comment.

Change the scholarship details.

Change the funding details.

Attach additional documents.

Change the load category.

# Step B3: 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 located to the right of the 'Load Category' field.

a. Click the pencil.

**Details** History

Case Information

Request Number: 03497392

Request Owner: Elizabeth Ng

\*Status: Faculty

View all dependencies

Assessment

RAO for approval: Search People...

Load Category: Part Time

Dropdown menu options: --None--, Full Time, Part Time (checked), ALL, Not entered

Outcome Comments

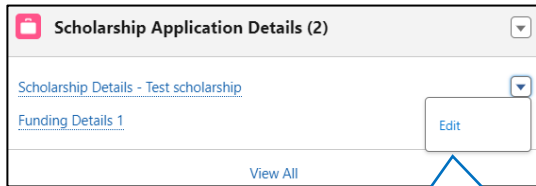
Buttons: Cancel, Save

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

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

d. Do not make other changes here.

# Step B4: Changing the scholarship details



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

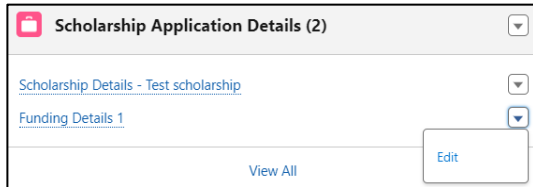
b. Change the relevant information in the Scholarship Details section. **Do not change the bottom Form Details section.**

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 three buttons: "Cancel", "Save & New", and "Save". 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 B5: 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 window will pop up.

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

Screenshot of the "Edit Funding Details 1" form. The form is titled "Edit Funding Details 1" and has a legend indicating that "\*" denotes Required Information. The form is divided into two main sections: "Funding Details" and "Form Details".

**Funding Details Section:**

- Funding Source:** A dropdown menu with "External" selected.
- Funding Source Details:** A text input field containing "ARC funding".
- RES:** An empty text input field.
- Account Holder:** A dropdown menu with "Elizabeth Ng" selected.
- External account holder email:** An empty text input field.
- Funding duration:** A text input field containing "3.5 years".
- Accounting String to fund payments:** A text input field containing "unknown".
- RM code:** An empty text input field.
- Account Holder App:** A dropdown menu with "Yes" selected.

**Form Details Section:**

- Scholarship Application Details Name:** A text input field containing "Funding Details 1".
- Request:** A dropdown menu with "Request" selected.

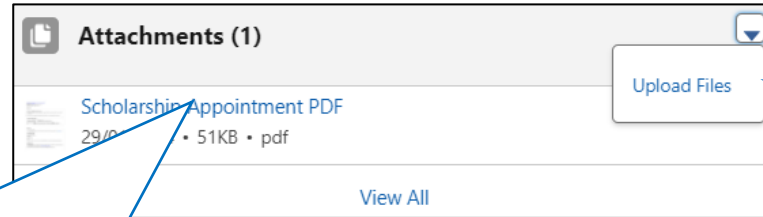
At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted in blue.

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.*

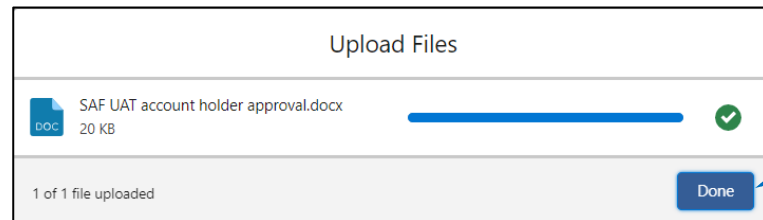


# Step B6: Attaching additional documents



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

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 new PDF can be generated using “Create PDF” (top-right corner) to reflect the most up-to-date information.



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

# Step B7: Responding to the RA

Thank you for creating a HDR scholarship request.

You can use this screen to send a message to the RA, or view the account holders who are yet to provide approval and send a reminder.

If you are the account holder, or wish to attach evidence of external funding, please go to relevant funding record (on the right column of this page) to do so.

**Who would you like to contact?**

Research Admin (RA)

Account Holders

Enter your message below

a. Select “Research Admin (RA)” and enter your message addressing the RA’s comments, specifying the changes made and responding to the questions.

b. Click “Next”. This is the last step of the Scholarship Appointment Form.

This scholarship request has been assigned to the Research Admin (RA) with your comments.

You can close this page.

Have a nice day!

c. Click “Finish” or close the browser or browser tab.  
The Faculty HDR Team will review the changes.