



The University of Texas
Health Science Center at Houston

School of Public Health

Salesforce Learning Contract Review and Approval Process

Faculty Quick-Reference Guide

Fall 2022

Salesforce Learning Contract Review and Approval Process

Faculty Quick-Reference Guide

Learning Contract Review Process

1. **Student Submission:** Student completes and submits a learning contract
2. **Faculty Mentor Review:** Learning contract is reviewed by the student's faculty mentor
3. **Administrative Review:** Learning contract is reviewed by the Office of Public Health Practice and Engagement
4. **Preceptor Review:** Learning contract is reviewed by the student's preceptor
5. **Approval:** Learning contract is fully approved & student receives an enrollment information email.

Faculty Mentor Review

Faculty Mentor review is step 2 in the learning contract review process. Upon submission of a learning contract, the faculty mentor identified in the contract receives an automatic email notification from the Learning Contract System. The email will originate from No-Reply@salesforce.com or noreply@eigenx.com.

From: No-Reply@salesforce.com <noreply@eigenx.com>

Subject: Learning Contract Record Creation:

**** EXTERNAL EMAIL ****

Dear "Faculty Member Name",

"Student Name" has submitted a learning contract for your review and approval. Please log into mySPH to review this learning contract.

By approving this learning contract, you confirm that you approve this student's practicum project, agree to serve as this student's faculty mentor, and authorize the Office of Public Health Practice to release a practicum registration code to this student.

Sincerely,

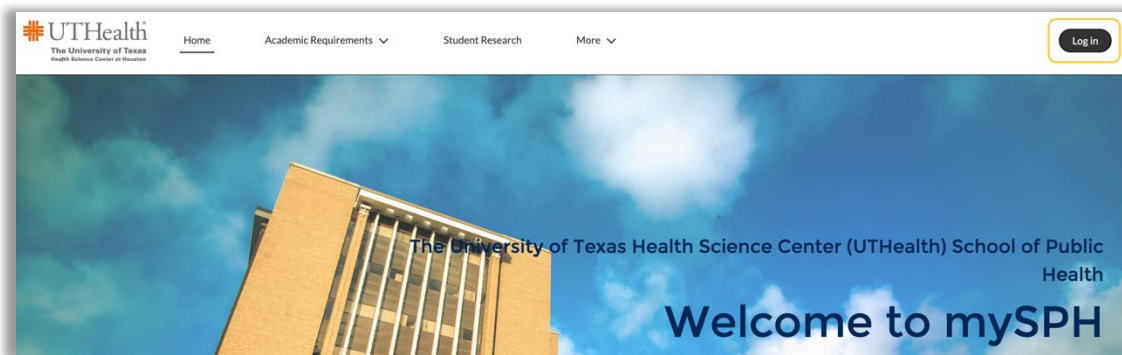
Office of Public Health Practice and Engagement

If you have further questions, please contact us at practicum@uth.tmc.edu.

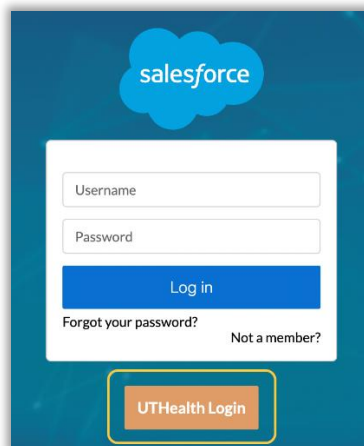
Steps for Review and Approval

1. Log into mySPH/Salesforce

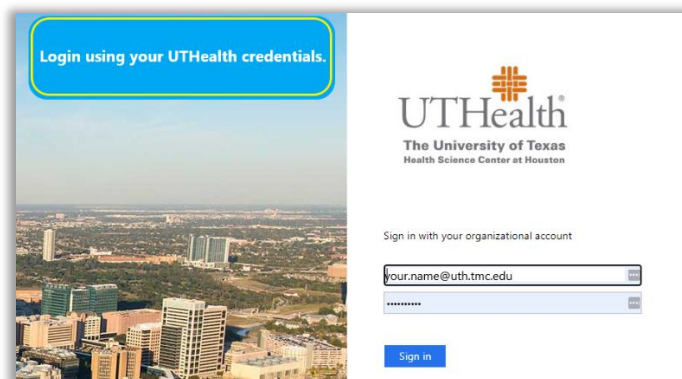
- Navigate to the [mySPH](#) landing page.
- Click the “**Log In**” button in the page's top right corner.



- Click the orange “**UTHealth Login**” button (located below the username and password fields).

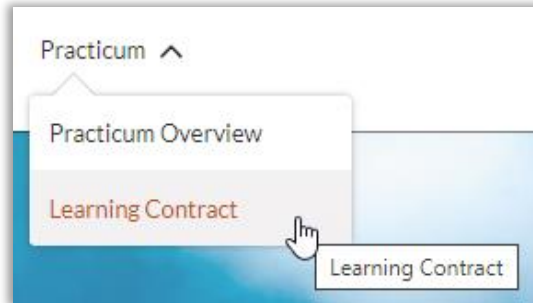


- Log in using your UTHealth username and password to gain access to the platform.



1. Navigate to the Learning Contract System

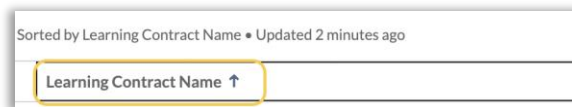
From the bar menu at the top of the page, select **“More”** and then **“Practicum > Learning Contract”**.



2. Find and Select the Learning Contract

A list of learning contracts will populate. To select a learning contract to review:

- Filter and sort learning contracts by toggling the **“Learning Contract Name”** column in the system dashboard.

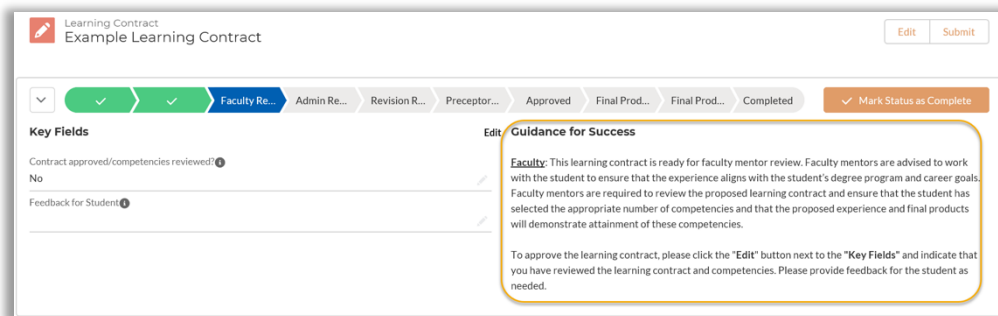


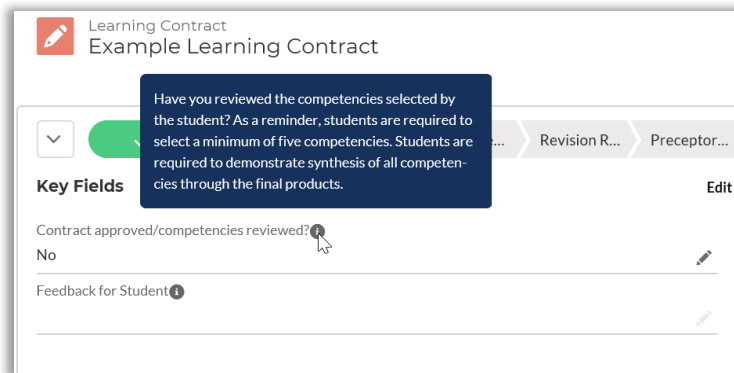
- Open the learning contract you would like to review by clicking on the learning contract name.

3. Complete a Review of the Learning Contract

Completion of faculty review requires your action to either provide approval or decline approval.

Guidance for success statements and helpful hints are provided throughout the Learning Contract System to offer advice for reviewing and approving learning contracts.





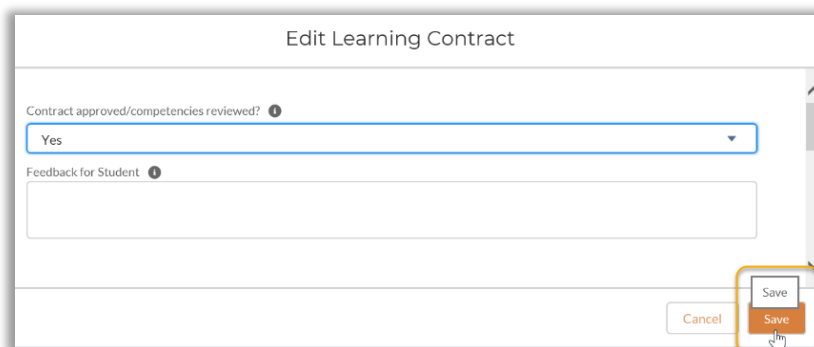
Additional information on practicum materials and requirements can be found in the practicum guides on the [Practicum Overview section of mySPH](#) for further review assistance.

Providing Approval

- a. Select the **"Edit"** button to the right of *Key Fields*.



- b. Select **"Yes"** from the dropdown menu for the question *"Contract approved/competencies reviewed?"*
- c. Select **"Save"** in the bottom right corner of the prompt.



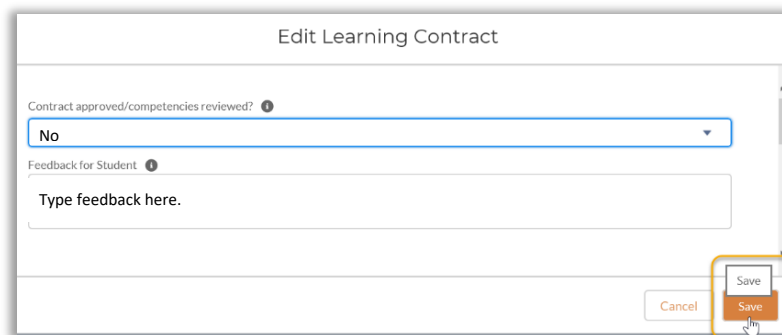
The approved learning contract then moves to the next step in the review process (Admin Review).

Declining Approval

- a. Select the **"Edit"** button to the right of *Key Fields*.



- b. Select **"No"** from the dropdown menu.
- c. Provide feedback in the *"Feedback for Student"* field.
- d. Select **"Save"** in the bottom right corner of the prompt.



- e. Email the student directly to indicate that their contract requires revision.
 - a. You will receive an email from Salesforce once the student resubmits the updated learning contract.
- f. Review the learning contract again and provide approval (outlined in steps a. through c. under "Providing Approval" above).



After your approval is saved, the faculty mentor review process is complete.

Review and Approval Process – Next Steps

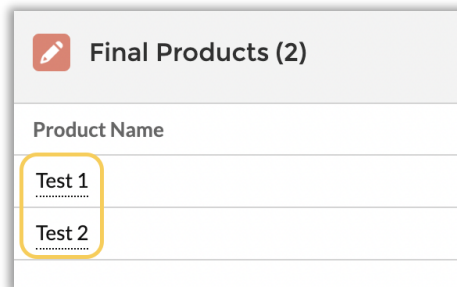
- After the learning contract receives faculty mentor approval, the contract undergoes administrative review by the Office of Public Health Practice and Engagement (Administrative Review).
- After administrative approval, the community preceptor receives an automatic notification via email requesting their review and approval of the contract. Preceptors can review and approve contracts directly from the email received by the Salesforce system.
- Once the community preceptor approves, the contract moves to "Approved" status.
- After the final approval is received, students will be emailed instructions for practicum credit hour enrollment by the Office of Public Health Practice and Engagement within two (2) business days of their contract reaching "Approved" status. This email includes details for the faculty mentor's section of PH 9997 and an enrollment permission number.

Deliverables: Final Product Review

Once a student uploads their final products to the Learning Contract System, faculty mentors can download, review, and note their approval of the deliverable items.

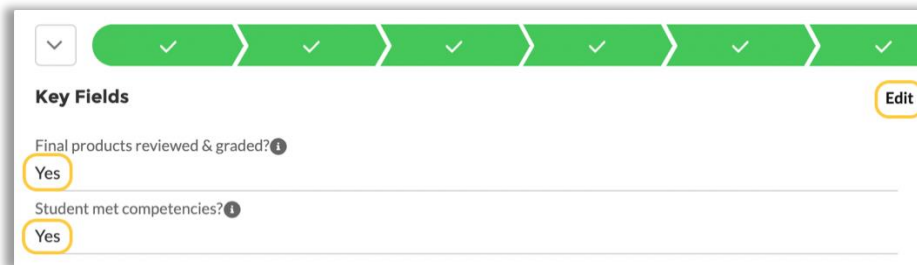
1. Download Final Products

- Log into the Learning Contract System via [mySPH](#) (login steps are outlined in “Log into mySPH/Salesforce” under *Steps for Review and Approval* above).
- Open the learning contract you would like to view by clicking on the learning contract name.
- Open each product by clicking on the project titles located in the “Final Products” box on the right-hand side of the contract.
- Download products for review.



2. Approve Final Products

- Click the “**Edit**” button located in the *Key Fields* section at the top of the contract.
- Indicate your completed review by changing the dropdown items in the “Final Products reviewed & graded” and “Student met competencies” fields.



- Contact the student via email with any correspondence related to final products.
- Enter the student grade for PH 9997 in myUTH.



After your approval is saved, the final product review process is complete.

*The Office of Public Health Practice and Engagement welcomes your questions and values your feedback.
We are available to assist as needed. Please contact us at practicum@uth.tmc.edu.*