Contents

1. Introduction ....................................................................................................................3
2. Departmental Inputter ..................................................................................................4
3. Departmental Approver ..............................................................................................10
4. Monitoring the Stages of a Bid ....................................................................................17
5. Cancelling or Reducing a Bid .....................................................................................22
6. Finance Approval ........................................................................................................23
7. Emails ...........................................................................................................................31
1. Introduction

This on-line form is to be used for DTA, CASE, Research Council funded studentships, Wellcome Trust, BHF, Marie Curie training site, individual studentships paid from departmental funds.

This document outlines the procedure for the following roles:

Departmental Inputter
Departmental Approver
Combined Departmental Inputter and Approver
Monitoring the Stages of a Bid
Cancelling or Reducing a Bid
Research Administration
Planning and Management Accounts
2. **Departmental Inputter**

1. **Log into PORTICO** at [www.ucl.ac.uk/portico](http://www.ucl.ac.uk/portico). PORTICO uses your main UCL ID, the same username and password as WTS. If you do not have a central UCL ID or if you have any difficulty with your password, please contact the IS helpdesk.

2. **Select the Section ‘Student Finance Management’** from the left hand list of links. In the ‘Department Fund Management’ container select the ‘Form input’ link:
3. Search for the student

Search for the student using the student number, first name or surname or a combination of these. You will only be able to retrieve students whose status is: enrolled; yet to enrol; resitting; enrolled debtor; in debt so cannot enrol; time limited enrolment. You will not automatically have access to create bids from other departments. If you need to raise a bid for a student from another department, an e-mail should be sent to porticoservices@ucl.ac.uk from the heads of both departments requesting access.

4. Select student

Click on ‘select this student’ to create a bid for the relevant student.

5. Select required academic year

You will then be prompted to select the required academic year for this UCL studentship.

Note: you will be unable to enter a bid if the student does not have an enrolment record for the selected year.
6. Enter Account Codes: Project, Task and Award

You will now be prompted to enter the Account codes for up to two Tuition Fee and up to two Stipend awards. *(Note: Where courses are ineligible for Tuition Fee studentships, the Tuition Fee option will be hidden)*

Start by inputting the Project code(s).

Use this link to look up project codes if you don’t know them already.

After entering your Project code(s) click the ‘Validate’ button. Once the Project code(s) are validated, you will then be shown the valid Task codes for your selected Project(s).

You must then select Task codes for each Project code input and then click the ‘Validate’ button.
Finally, you must select the Award code for each Project/Task code selected. You can then click the “Validate” button to see the full Project/Task/Award name (see below).

Now click the “Continue” button to proceed with the bid input.

**Note:** If you go need to back and edit (or remove) a Project Codes at this point, you must then click the validate button to re-start the validation process to ensure that the Task & Award codes match the amended Project Code (or are removed).
7. Enter Source of Funding - Sponsor Code

For some Project /Type combinations (where Project Type is not Sponsored Research or Doctoral Training) you will need to specify a Source of Funding Sponsor code. If you do not know the sponsor code use the ‘List’ buttons to access the sponsor-code look-up facility and there you can search for the code:

When you have input Sponsor Code(s) you must then click the “Continue” button

8. Enter Source of Funding - Sponsor Name

For some Sponsors, you will need to input Sponsor Name in the text box as shown below:

When you have input Sponsor Name(s) you must then click the “Continue” button
9. Tuition and Stipend Amounts, Studentship dates, and Approval

You will be asked to specify amounts and start and end dates for studentships. If you happen to be a departmental approver (as well as a bid inputter) you will also be able to approve the bid here should you wish:

The project codes are validated by date – if the studentship start and/or end dates fall outside of the project dates then you will need to amend the dates specified for the studentship (or go back and choose difference project codes).

The studentship start and end dates also govern how many stipend instalments will be generated. Typically four payments are generated with payment dates in September, December, March and June.

- The studentship start and end dates must cover at least one of these 4 set payment dates in order for any payments to generate. The more payment dates you cover, the more instalments will be generated
  - i.e. if you only want to pay a student 3 instalments, with the last being paid in March, please ensure that your studentship end date is prior to the payment date in June and your start date is the same as (or earlier than) the payment date in September.
- If your studentship start and end dates do not cover any of the 4 set payment dates for the academic year, no payment will generated.
- Please contact Student Funding on studentfunding@ucl.ac.uk or 020 7679 0004 if you need further advice on which start and end dates to use.

Please note, the start and end dates of the studentship are also validated against a student’s enrolment dates. If the entered end date of the studentship is after the end of the students’ course in an academic year, the form will return an error.

10. **Bid submitted**

When you have stored the bid (and all date validation checks have been passed) you will be taken to a confirmation screen.

The OK button returns you to the Student Fund management homepage. Once the bid has been approved by your department and finance, you will receive a copy of the e-mail sent to the student notifying them of the studentship.

3. **Departmental Approver**

1. **Log into PORTICO** at [www.ucl.ac.uk/portico](http://www.ucl.ac.uk/portico). PORTICO uses your main UCL ID, the same username and password as WTS. If you do not have a central UCL ID or if you have any difficulty with your password, please contact the IS helpdesk.

2. **Select the Section ‘Student Finance Management’** from the left hand list of links. In the ‘Department Fund Management’ container select the ‘Departmental approval’ link:
3. **View Bids awaiting approval:** This will take you directly to a list of bids in your department that are awaiting approval. Select the appropriate bid by clicking on 'select this bid'.

![Image of a list of bids](image1)

4. **Edit Account Codes or Continue:**

You will be shown the following screen with the Amounts, Account Codes, etc input at the bid stage.

![Image showing account codes](image2)

You must choose if you wish to amend any of the codes and then click Continue.

- If you chose Yes – you will be taken to step 5: “Edit Account Codes”
- If you chose No – you will be taken to step 8: “Tuition and Stipend Amounts, Studentship dates, and Approval” step
5. Edit Account Codes: Project, Task and Award

You will now be prompted to edit the Account codes for up to two Tuition Fee and up to two Stipend awards. *(Note: Where courses are ineligible for Tuition Fee studentships, the Tuition Fee option will be hidden)*

The Amount(s) and Project code(s) input at the bid stage will be displayed.

Use this link to look up project codes if you don’t know them already.

After editing the Project code(s) click the ‘Validate’ button. Once the Project code(s) are validated, you will then be shown the valid Task codes for your selected Project(s).

You must then select Task codes for each Project code input and then click the ‘Validate’ button.
Finally, you must select the Award code for each Project/Task code selected. You can then click the “Validate” button to see the full Project/Task/Award name (see below).

Now click the “Continue” button to proceed with the bid input.

**Note:** If you go need to back and edit (or remove) a Project Codes at this point, you must then click the validate button to re-start the validation process to ensure that the Task & Award codes match the amended Project Code (or are removed).

6. Enter Source of Funding - Sponsor Code

For some Project>Type combinations (where Project Type is not Sponsored Research or Doctoral Training) you will need to specify a Source of Funding Sponsor code. If you do not know the sponsor code use the ‘List’ buttons to access the sponsor-code look-up facility and there you can search for the code:

When you have input Sponsor Code(s) you must then click the “Continue” button.
7. Enter Source of Funding - Sponsor Name

For some Sponsors, you will need to input Sponsor Name in the text box as shown below:

When you have input Sponsor Name(s) you must then click the “Continue” button.
8. Tuition and Stipend Amounts, Studentship dates, and Approval

You will now be asked to check and edit amounts and start and end dates for studentships. You must then approve or reject the bid:

Input your Approved or Rejected decision and then Click Store

The project codes are validated by date – if the studentship start and/or end dates fall outside of the project dates then you will need to amend the dates specified for the studentship (or go back and choose difference project codes).

The studentship start and end dates also govern how many stipend instalments will be generated. Typically four payments are generated with payment dates in September, December, March and June.

- The studentship start and end dates must cover at least one of these 4 set payment dates in order for any payments to generate. The more payment dates you cover, the more instalments will be generated
  - i.e. if you only want to pay a student 3 instalments, with the last being paid in March, please ensure that your studentship end date is prior to the payment date in June and your start date is the same as (or earlier than) the payment date in September.
- If your studentship start and end dates do not cover any of the 4 set payment dates for the academic year, no payment will be generated.
• Please contact Student Funding on studentfunding@ucl.ac.uk or 020 7679 0004 if you need further advice on which start and end dates to use.

Please note, the start and end dates of the studentship are also validated against a student’s enrolment dates. If the entered end date of the studentship is after the end of the students’ course in an academic year, the form will return an error.

11. **Complete**

Once the validation checks have been passed, you will then be taken to a confirmation screen.

The OK button returns you to the Student Fund management homepage. Once the bid has been approved by your department and finance, you will receive a copy of the e-mail sent to the student notifying them of the studentship.
4. Monitoring the Stages of a Bid

There are two ways that departments can use to monitor the progress of bids: first, through the ‘Bid Review’ functionality; and, second, through PORTICO reports. Both are accessed through the PORTICO staff front page at [www.ucl.ac.uk/portico](http://www.ucl.ac.uk/portico).

**Departmental Bid Review**

Select the Section ‘Student Finance Management’ from the left hand list of links. In the ‘Department Fund Management’ container select the ‘Departmental Bid Review’ link:

1. Select the academic year from the drop down list and click ‘Search’.

2. You will be taken directly to a list of bids raised by your department. If your bid does not appear on the first page, move between pages by clicking the numerals above the list. To view bids from another academic year, click ‘New Search’ at the bottom of the page.
3. To view a bid, click on ‘select this bid’ to the left of the list. Each page will list ten bids.
PORTICO Reports
1. Log into PORTICO reports by clicking on the link to ‘Portico Reports’ in the ‘Reports’ container on the bottom left of the staff front page.

If the reports container does not appear, please contact PORTICO Services.

2. PORTICO reports will open in a new window and you will be prompted to log in, use the same user name and password that you use for PORTICO. Once you have logged in, click on the ‘Fund Management’ link to access the Studentships reports.
3. To run the report to review your department’s bids click on ‘Studentship Department Bid Review’

4. You will be prompted to enter parameters to the run the report.

5. Use % as a wildcard. If you need to run the report for more than one department, click on ‘Show Values’ and select the departments you need using Shift+Click or Ctrl+Click.

6. Once the report has run, you will be able to save it to your computer as an Excel document or PDF file. Click on the ‘Save’ link at the top left under the UCL header.
7. Use the radio buttons to select your preferred format and then click on the computer icon to save the document to your computer.
5. Cancelling or Reducing a Bid

If you wish to cancel or reduce a bid, e-mail Kevin King at kevin.king@ucl.ac.uk. You need to include the following details with your request:

- Student Name
- Student Number
- Amounts approved for tuition and stipend
- Codes used
- The action requested – either cancellation or reduction
6. Finance Approval

1. Receive e-mail notifying you of bids awaiting approval in the Fund Management container.

2. Go to the PORTICO website at: www.ucl.ac.uk/portico. PORTICO uses your main UCL ID, the same username and password as WTS. If you do not have a central UCL ID or if you have any difficulty with your password, please contact the IS helpdesk.

3. Select the Section 'Student Finance Management' from the left hand list of links. In the 'Finance Fund Management' container select the ‘Finance approval’ link:

4. View Bids awaiting finance approval:
You will be taken directly to a list of bids awaiting approval. The list is ordered by department code, which in some instances orders differently from department name, and then by student surname. Click on ‘select’ to process a bid.
5. Fully Approve, Amend or Reject Bid: You will next be presented with a summary of the bid and you need to choose whether to Fully Approve, Amend or Reject the bid:

<table>
<thead>
<tr>
<th>STUDENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Status</td>
</tr>
<tr>
<td>Dept</td>
</tr>
<tr>
<td>Number</td>
</tr>
<tr>
<td>Course</td>
</tr>
<tr>
<td>Year</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>BID SIGNATURES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned To</td>
</tr>
<tr>
<td>Dept</td>
</tr>
<tr>
<td>Finance</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STUDENTSHP PAYMENT PERIOD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
</tr>
<tr>
<td>02/Jan/2014</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TUITION FEE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
</tr>
<tr>
<td>1st £1,000.00</td>
</tr>
<tr>
<td>2nd £2,000.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>STIPEND</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
</tr>
<tr>
<td>1st £3,000.00</td>
</tr>
<tr>
<td>2nd £4,000.00</td>
</tr>
</tbody>
</table>

**NOTES:**
1. Bid input stage

What would you like to do?
- Fully approve the whole bid without any amendments
- Amend bid and/or partially approve
- Reject this bid
- Exit - return to list of bids

If you fully approve or reject the bid, you will be taken to a summary screen with details of what has been done. The screen are the same, except when a bid is rejected, there is a facility to send the reasons for rejection back to the department by e-mail.
6. Change account codes?

If you choose to amend and/or partially approve the bid you will first be asked whether you want to change any of the account codes.

If you chose to edit or change an account code(s), you will be taken to a screen to enter and then validate the revised account code(s).

7. Edit Account Codes: Project, Task and Award

You will now be prompted to edit the Account codes selected.

The Amount(s) and Project code(s) input at the bid stage will be displayed.

Use this link to look up project codes if you don’t know them already.

After editing the Project code(s) click the ‘Validate’ button.
Once the Project code(s) are validated, you will then be shown the valid Task codes for your selected Project(s).

You must then select Task codes for each Project code input and then click the ‘Validate’ button.

Finally, you must select the Award code for each Project/Task code selected. You can then click the “Validate” button to see the full Project/Task/Award name (see below).

Now click the “Continue” button to proceed with the bid input.

**Note:** If you go need to back and edit (or remove) a Project Codes at this point, you must then click the validate button to re-start the validation process to ensure that the Task & Award codes match the amended Project Code (or are removed).
8. Enter Source of Funding - Sponsor Code
For some Project /Type combinations (where Project Type is not Sponsored Research or Doctoral Training) you will need to specify a Source of Funding Sponsor code. If you do not know the sponsor code use the 'List' buttons to access the sponsor-code look-up facility and there you can search for the code:

![Image of Sponsor Code Input]

When you have input Sponsor Code(s) you must then click the “Continue” button.

9. Enter Source of Funding - Sponsor Name
For some Sponsors, you will need to input Sponsor Name in the text box as shown below:

![Image of Sponsor Name Input]

When you have input Sponsor Name(s) you must then click the “Continue” button.
10. Tuition and Stipend Amounts, Studentship dates, and Approval

Use the radio buttons to record whether the bid is to be approved. If one of the account codes has already been approved and approval is outstanding on another code, only the code awaiting approval will appear on the screen.

Select the radio button to approve or reject each tuition and stipend bid. You can also re-assign the bid to Planning and Management, or Research Administration.

*Please note:* If there are both Research Administration and Planning and Management account codes on one bid the bid will normally be assigned to Research Admin first. If, once you have completed your approval, there is approval outstanding from Planning and Management or Research Admin, please ensure that you assign the bid appropriately. If this is not done the process cannot be completed.

*Please note:* If you click on the radio button for “Rejected” for any tuition or stipend bid item, and then click store, then the bid is rejected and if Departments want to pay the student then they will have to submit a new bid. Consequently if the bid is comprised of Planning and Management codes (which you cannot approve) and Research Administration codes, and you do not wish to approve the Research Administration codes, it would be better to zero out the amounts for the Research Administration codes (with the Department’s approval) in order to allow the payments from the Planning and Management Accounts to proceed.

The project codes are validated by date – if the studentship start and/or end dates fall outside of the project dates then you will need to amend the dates specified for the studentship (or go back and choose difference project codes).
The studentship start and end dates also govern how many stipend instalments will be generated. Typically four payments are generated with payment dates in September, December, March and June.

- The studentship start and end dates must cover at least one of these 4 set payment dates in order for any payments to generate. The more payment dates you cover, the more instalments will be generated
  - i.e. if you only want to pay a student 3 instalments, with the last being paid in March, please ensure that your studentship end date is prior to the payment date in June and your start date is the same as (or earlier than) the payment date in September.

- If your studentship start and end dates do not cover any of the 4 set payment dates for the academic year, no payment will generated.

- Please contact Student Funding on studentfunding@ucl.ac.uk or 020 7679 0004 if you need further advice on which start and end dates to use.

Please note, the start and end dates of the studentship are also validated against a student’s enrolment dates. If the entered end date of the studentship is after the end of the students’ course in an academic year, the form will return an error.

12. Complete – Bid items still require approval

Once the validation checks have been passed, and where some items in the bid still require approval, you will be taken to the following confirmation screen.

Pressing ‘ok’ will take you back to the list of bids that still need processing.
13. **Complete – Approved or Rejected**

Once the validation checks have been passed, and where all items have been approved, or at least one item has been rejected, you will then be taken to the following confirmation screen.

Pressing ‘ok’ will take you back to the list of bids that still need processing.
7. Emails

When a bid is approved an e-mail is generated notifying the student of the award. The student will receive one of two e-mails depending whether the bid included a stipend or tuition fees only.

1. If the bid includes a stipend, the e-mail has the following text:

This is an automatically generated email. Please do not reply.

MISS STUDENT
SN: xxxxxxxx
Department: Institute of Neurology

25/Jul/2014

Dear Miss Student,

UCL Studentships 2013-14

I wish to confirm that you have been awarded a UCL Studentship for postgraduate work in the Department Institute of Neurology.

Funds payable in academic year 2013/2014 are as follows:

Stipend 1:
£17.50 24/Sep/2013
£17.50 13/Dec/2013
£17.50 28/Mar/2014
£17.50 27/Jun/2014

These are the standard payments dates for the academic year. If you commence your studies part-way through the academic year, the dates listed above may be subject to change.

Please Note:

***Stipend payments are only automatically released to students who are fully enrolled at UCL***

If you are a new student, your first payment will be made within 10 working days of you becoming fully enrolled. In most cases, enrolment for new students takes place during the first few weeks of term. It is therefore possible that you will not receive your first stipend payment on the date listed above and you may wish to arrange alternative means of financial support for the start of term.

If any of the dates above are in the past, payment will normally be made within 10 working days of the date of this email, or the date from which you become fully enrolled.

If your enrolment status changes for any reason, from “Enrolled”, during the academic year then the payment of your stipend may be affected. If you interrupt you should therefore inform your department promptly to avoid any delays to your stipend payments.

If you have any queries regarding your enrolment, please contact Student Records (studentrecords@ucl.ac.uk) or Student Fees (fees@ucl.ac.uk) as appropriate.

Stipend payments are made in advance, if you withdraw/terminate your studies you may
therefore be liable to repay any monies that have been overpaid. If you interrupt, repayment may be via means of adjusting, withholding, or cancelling future stipend payments. Please contact your academic department if you require confirmation of funds owed.

Method of Payment:
Your award will be paid directly into your bank account by the above dates, as long as:
A) You have logged your bank details online through Portico at least three weeks prior to the payment due date, or
B) You have submitted your bank details in a previous year.

***New students are only able to log bank details on Portico after they have completed enrolment; the first stipend payment is therefore usually paid via cheque***

To log your bank details on Portico you will need to go to the “My Money” section and select the “View/update your bank details” option and enter them under the “Studentship Stipend” heading. Please ensure that a reference is entered; the reference is for your information only and is the wording that will appear on your bank statement when the stipend is paid in.

Where a studentship is to be paid via cheque, you will need to collect it from the Student Funding Office, G19 South Wing, in Student Registry Services. Collection will only be possible on presentation of a valid UCL ID card.

Further information on studentships and frequently asked questions can be found on our website: https://www.ucl.ac.uk/prospective-students/scholarships/graduate/researchcouncils/PhD_Studentship_admin_info

If you have any queries regarding the above, or require any further confirmation of your award, please contact the person who processed your studentship:-
Departmental inputter
Department: Institute of Neurology
Email: departmentalinputter@ucl.ac.uk

The e-mail is sent to the student and copied to the departmental inputter.

2. If the bid only covers tuition fees, then the e-mail has the following text:

This is an automatically generated email. Please do not reply.

DR STUDENT
Department: Division of Medicine
26/Sep/2008

Dear Dr Student,

UCL Studentships 2008-2009

You have been awarded a UCL Studentship for postgraduate work in the Department Division of Medicine.

The value of your studentship is:

Tuition:
Fee: £1,650.00

If you have any queries regarding the above, please contact the person who processed this award:-
Departmental Inputter
Department: Division of Medicine Email:
d.inputter@ucl.ac.uk

The e-mail is sent to the student and copied to the departmental inputter.