



Registry

UCL Studentships

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Reference: PORT-Studentships
Date: 04/06/2020
Revisions: 2.6

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1. Introduction

This on-line form (S) is to be used for Studentships that fund stipend (maintenance) and/or tuition fee costs for Postgraduate Research Students where UCL is the budget holder.

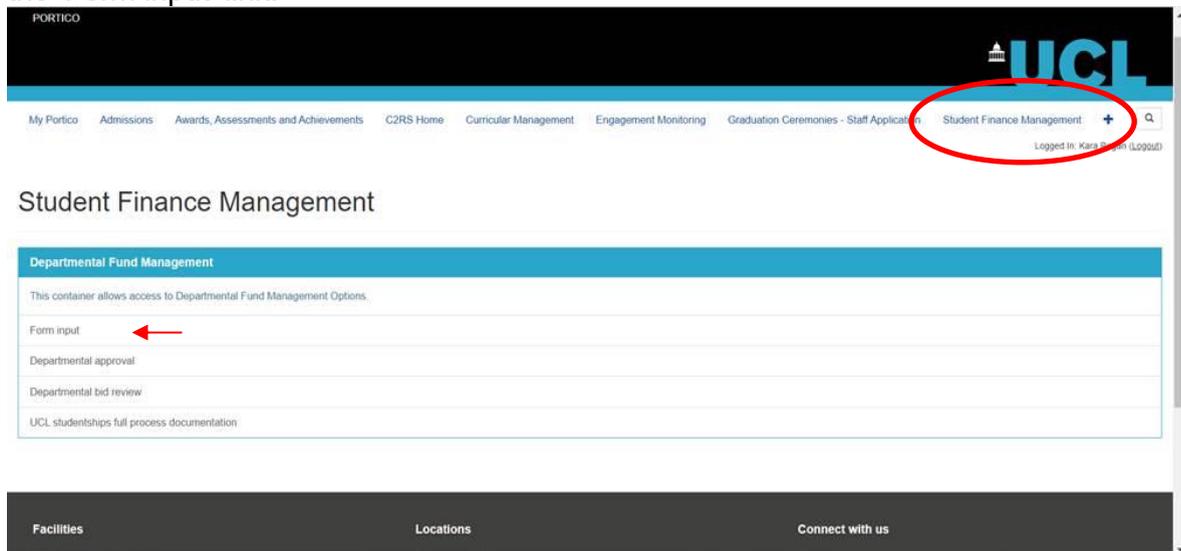
This document outlines the procedure for the following roles:

- Departmental Inputter
- Departmental Approver
- Combined Departmental Inputter and Approver
- Research Services
- School Finance Teams

2. Departmental Inputter

2.1 **Log into PORTICO** at www.ucl.ac.uk/portico. PORTICO uses your main UCL ID username and password. If you do not have a central UCL ID or if you have any difficulty with your password, please contact the ISD helpdesk <https://www.ucl.ac.uk/isd/>

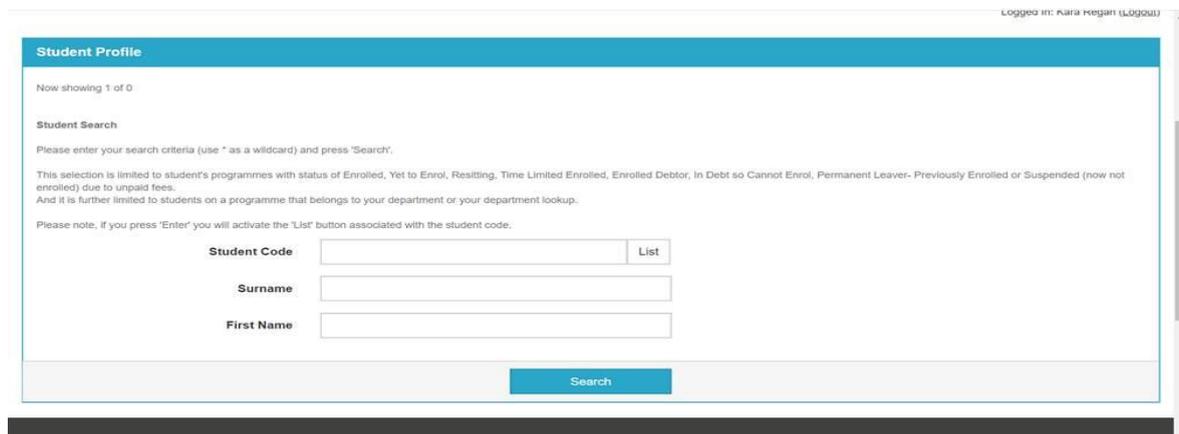
2.2 **Select the 'Student Finance Management'** from the top menu (click on the + symbol for more options). In the **'Department Fund Management'** container select the **'Form input'** link:



2.3 Search for the student

Search for the student using the student number/code (see below), 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 for other academic departments. If you need to need to raise a bid for a student from another department, an e-mail should be sent to itservices@ucl.ac.uk from the Heads of both departments requesting access.



2.4 Select student

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

Logged In: Kara Regan (Logout)

Student Programme Route data

Now showing records 1 - 1 of 1

Search results

Please click on the link 'select this student' in the left hand column of the required student

Select this Student	Student code	Surname	Forename	Date of birth	Status
select this student					ENROLLED

Facilities: Faculties and departments
Locations: Maps and buildings
Connect with us: Alumni

2.5 Select required academic year

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

Fund Management Input

Bid Year

Select the required year of Fund UCL Studentships

2020/21
 2019/20

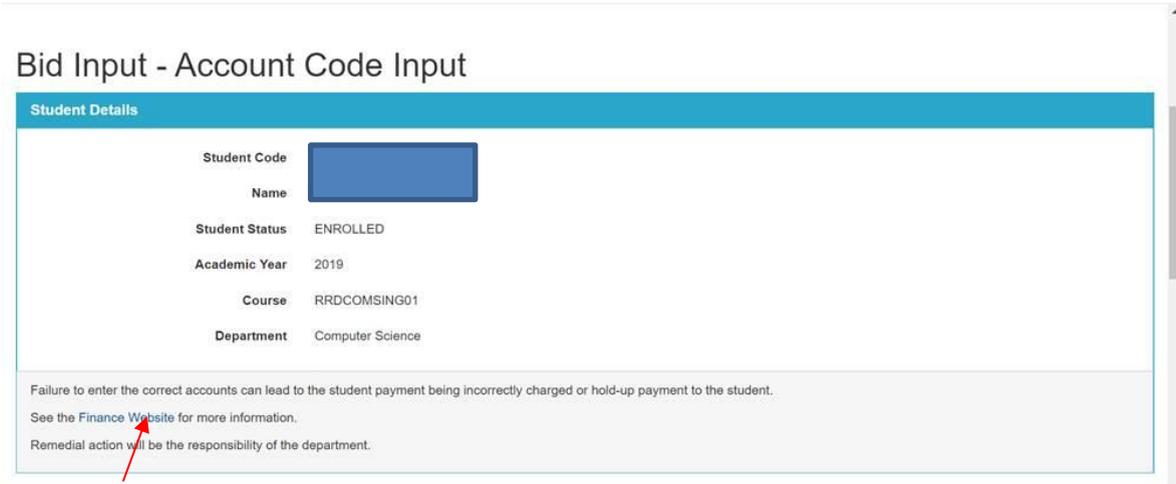
Continue

Note: you will be unable to enter a bid if the student does not have an enrolment record for the selected year.

2.6 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 payment amounts. *(Note: Where courses are ineligible for Tuition Fee studentships, the Tuition Fee option will be hidden)*

Start by inputting the Project code(s).



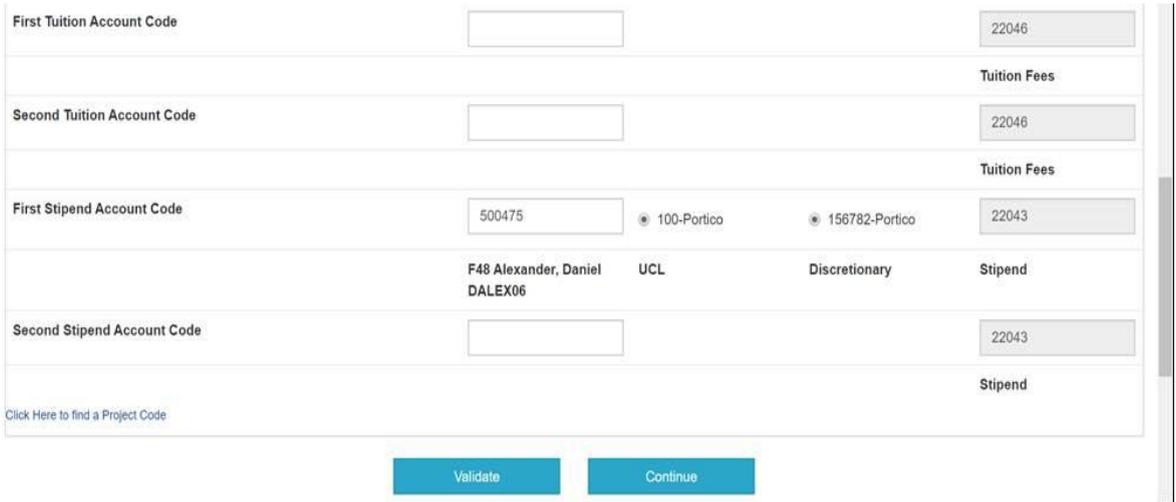
The screenshot shows a web form titled "Bid Input - Account Code Input". At the top, there is a blue header with the text "Student Details". Below this, the form contains several fields with labels and values:

Student Code	[Redacted]
Name	[Redacted]
Student Status	ENROLLED
Academic Year	2019
Course	RRDCOMSING01
Department	Computer Science

Below the student details, there is a warning message: "Failure to enter the correct accounts can lead to the student payment being incorrectly charged or hold-up payment to the student. See the Finance Website for more information. Remedial action will be the responsibility of the department." A red arrow points from this message to the "Validate" button in the next screenshot.

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).



The screenshot shows the same form as above, but now with account code selection options. The form is divided into sections for Tuition Fees and Stipend.

First Tuition Account Code	[Input Field]	22046		
		Tuition Fees		
Second Tuition Account Code	[Input Field]	22046		
		Tuition Fees		
First Stipend Account Code	500475	100-Portico	156782-Portico	22043
	F48 Alexander, Daniel DALEX06	UCL	Discretionary	Stipend
Second Stipend Account Code	[Input Field]	22043		
		Stipend		

At the bottom of the form, there is a link: "Click Here to find a Project Code". Below the form, there are two buttons: "Validate" and "Continue".

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

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).

Now click the "Continue" button to proceed with the bid input.

Note: If you go need to back and edit (or remove) 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).

2.7 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:

Bid Input - Source of Funding Code Input

Student Details

Student Code	<input type="text"/>
Name	<input type="text"/>
Student Status	ENROLLED
Academic Year	2019
Course	RRDCOMSING01
Department	Computer Science

See the Finance Website for more information.

First Stipend Account Code	500475.100.156782.22043
First Stipend Sponsor Code	<input type="text" value="03"/> <input type="button" value="List"/>

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

2.8 Tuition and Stipend Amounts, Studentship dates, Payment Instalments, 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 at this stage.

The screenshot shows a web form titled "Bid Input" with two main sections: "Student Details" and "Additional Information".

Student Details:

- Student Code: [Redacted]
- Name: [Redacted]
- Student Status: ENROLLED
- Academic Year: 2019
- Course: RRDCOMBSG01
- Department: Computer Science
- Total Tuition Fee: £ 24450

Additional Information:

Please fill in the information for the student you have selected

Amount Guidance: Please also ensure the numbers are entered plain and without any currency symbols or commas. Only enter the decimal point and pence amount if required e.g. £1000.00 should be entered as 1000. The total stipend amount you enter will be split into monthly payment instalments based on the 'start' and 'end' dates you choose. This form does not calculate pro-rata payments.

First Stipend Amount: 1500 (circled in red)

First Stipend Account Code: 800479-100-156782-22043
F48 Alexander, Daniel DALEX06 UCL Discretionary

First Stipend Sponsor Code: 03
Student Awards Agency for Scotland

First Stipend Sponsor Text: Student Awards Agency for Scotland

Date Guidance: Please only amend the 'start' and/or 'end' date if you do not want to pay the stipend over 12 equal monthly instalments. You can amend both the 'start' and 'end' date if you want fewer payments, but the system will only permit payments over consecutive months. Payments dates are set for the 1st day of each month, in advance. The earliest start payment date is 1st Oct. If you want an immediate payment, and it is more than 11 days from your input date until the next payment date, choose the 1st of the current month. Please see the 'payments' section of the 'Form S User Guide' for more information on how instalments are calculated.

Start date for the period of the studentship: 23/Sep/2019

End date for the period of the studentship: 22/Sep/2020

Notes: These notes are to be used for information purposes by the department. They will not be acted upon because this is an automated process. Please avoid the use of commas. (Max. size 226 characters.)

225 more characters available:

Approval by Departmental Authorised Signatory: Approved Rejected No Approval Entered

Buttons: back, Store

The default start and end dates are for the academic year, but you can amend these as required.

The project budget 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 different project budget codes).

If the budget (PTA) being used to pay either the tuition fee or stipend has a start date of 1st October (in the upcoming financial year) on MyFinance, you should still use the default start date on the Form S (which will be the first day of Term 1). Portico automatically recognises you wish to make a term 1 payment, even though the PTA opens slightly later.

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.

The studentship start and end dates also govern how many **stipend instalments** will be generated. The absolute amount of funding you enter for stipends will be split into equal instalments. **Stipend payments are made on the first of each month** (starting on 1st October each academic session)

The studentship start and end period must cover at least one of the possible 12 payment dates in order for any payments to generate. The more payment dates you cover, the more instalments will be generated e.g.

- If you leave the default start (of Term 1) date and end (of session) date this will generate 12 equal monthly payments;
- If you only want to pay a student for Term 1 (i.e. October to December) you should amend the end date to 31 December;
- If you only want to pay one month then you should choose a start date of the 1st of that month and an end date of the last day of that month. You can also apply this logic to multiple months.

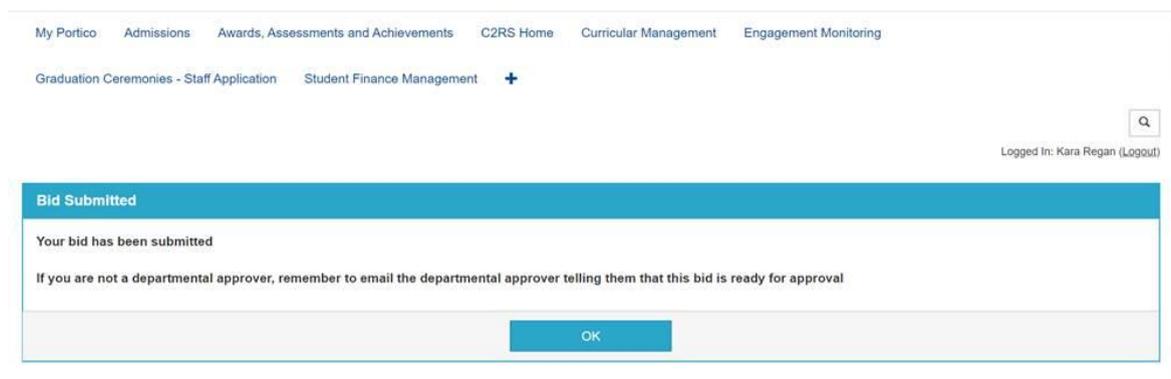
If you choose a start date in the middle of a month e.g. 15th October, then the first payment would not be until 1st November

Please note: due to UCL Christmas closure period the January stipend payment will be made late December.

Please contact Student Funding via sfostaffenquiries@ucl.ac.uk if you need further advice on which start and end dates to use.

2.9 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 Finance 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 payment schedule. If there are any errors with the payment schedule please contact sfostaffenquiries@ucl.ac.uk

3. Departmental Approver

3.1 **Log into PORTICO** at www.ucl.ac.uk/portico. PORTICO uses your main UCL ID username and password. If you do not have a central UCL ID or if you have any difficulty with your password, please contact the ISD helpdesk.

3.2 **Select the Section ‘Student Finance Management’** from the top menu of links (click + to open more options). In the ‘Department Fund Management’ container select the ‘Departmental approval’ link:

Student Finance Management



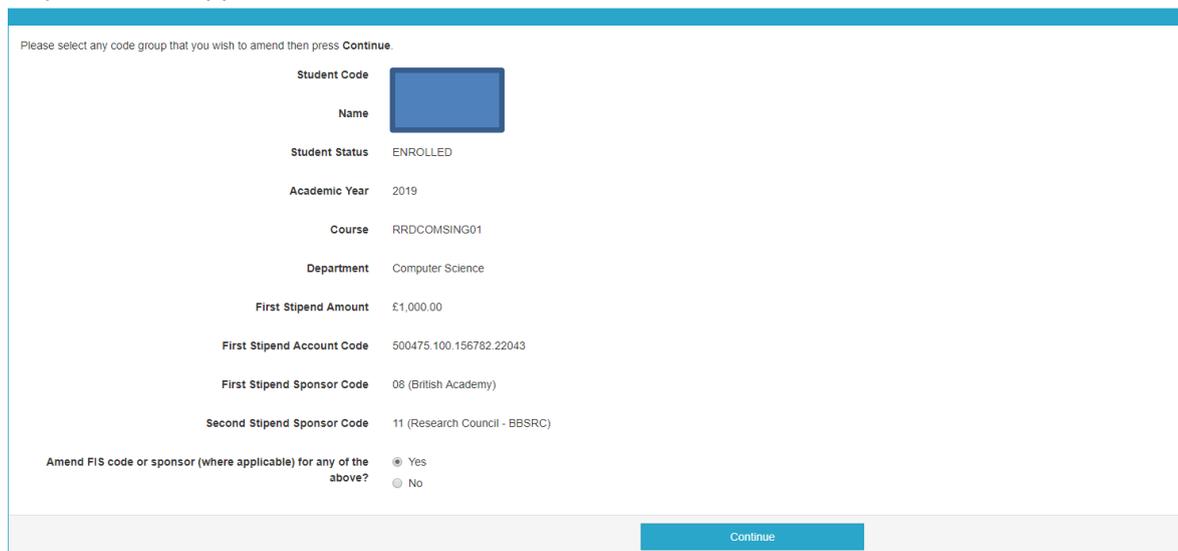
This will take you directly to a list of bids in your department that are awaiting approval. Select the appropriate bid by clicking on ‘select this bid’:



3.3 Edit Account Codes or Continue:

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

Departmental Approval - Code Amendment Selection

A screenshot of the 'Departmental Approval - Code Amendment Selection' form. The form displays the following information: Student Code, Name, Student Status (ENROLLED), Academic Year (2019), Course (RRDCOMSING01), Department (Computer Science), First Stipend Amount (£1,000.00), First Stipend Account Code (500475.100.156782.22043), First Stipend Sponsor Code (08 (British Academy)), and Second Stipend Sponsor Code (11 (Research Council - BBSRC)). At the bottom, there is a question: 'Amend FIS code or sponsor (where applicable) for any of the above?' with radio buttons for 'Yes' and 'No'. A 'Continue' button is located at the bottom right.

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 3.4: “Edit Account Codes”
- If you chose No – you will be taken to step 3.8: “Tuition and Stipend Amounts, Studentship dates, and Approval” step

3.4 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 payment entries. (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.

Departmental Approval, Code Amendment Selection

Please update any code group that you wish to amend, starting with the Project code, and then press **Validate**
If you do not wish to make any amendments, or have completed all your changes, please click **Continue**

The screenshot shows a form titled 'Student Details' with the following information:

- Student Code: [Redacted]
- Name: [Redacted]
- Student Status: ENROLLED
- Academic Year: 2019
- Course: RRDCOMSING01
- Department: Computer Science

Below the details is a table with columns: Project, Task, Award, Exp. Type. The table contains one row:

	Project	Task	Award	Exp. Type
First Stipend Amount	£ 1,000.00			
First Stipend Account Code	500475			22043

Below the table is a link: [Click Here to find a Project Code](#). At the bottom are two buttons: **Validate** and **Continue**.

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).

Departmental Approval, Code Amendment Selection

Please update any code group that you wish to amend, starting with the Project code, and then press **Validate**
If you do not wish to make any amendments, or have completed all your changes, please click **Continue**

The screenshot shows the same 'Student Details' form as above. The table now has two rows:

	Project	Task	Award	Exp. Type
First Stipend Amount	£ 1,000.00			
First Stipend Account Code	500475	100-Portico	156782-Portico	22043
	F48 Alexander, Daniel DALEX06	UCL		Stipend

At the bottom are two buttons: **Validate** and **Continue**.

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).

3.5 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

Departmental Approval - Source of Funding Code Input

Please update any Source of Funding Code that you wish to amend then click **Continue**.

Student Details	
Student Code	[Redacted]
Name	[Redacted]
Student Status	ENROLLED
Academic Year	2019
Course	RRDCOMSING01
Department	Computer Science

See the Finance Website for more information.

First Stipend Sponsor Code	08	List	British Academy
Second Stipend Sponsor Code	11	List	Research Council - BBSRC

Continue

3.6 Enter Source of Funding - Sponsor Name

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

Departmental Approval - Source of Funding Code Input

Please update any Source of Funding Code that you wish to amend then click **Continue**.

Student Details	
Student Code	12062389
Name	DIMITRIOS STAMOS
Student Status	ENROLLED
Academic Year	2019
Course	RRDCOMSING01
Department	Computer Science

First Stipend Account Code	500475.100.156782.22043
Second Stipend Sponsor Code	979999 enter sponsor type - please enter name
Second Stipend Sponsor Text	[Empty text box]

Continue

When you have input Sponsor Name(s) you must then click the "Continue" button

3.7 Tuition and Stipend Amounts, Studentship dates, Payment Instalments, 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. The top of the page has the student details:

Departmental Approval

Student Details

Student Code	<input type="text"/>
Name	<input type="text"/>
Student Status	ENROLLED
Academic Year	200620072008200920102011201220142017201520132016 201820192020
Course	RRDCOMSING01
Department	Computer Science
Total Tuition Fee	£ 24450

If you consider that the Total Tuition Fee stated is incorrect, please consult the [Fees Matrix](#).
See the [Student Budget Calculations](#) for minimum stipend amounts for full time students.

Additional Information

Please fill in the information for the student you have selected

Amount Guidance	Please also ensure the numbers are entered plain and without any currency symbols or commas. Only enter the decimal point and pence amount if required e.g. £1000.00 should be entered as 1000 The total stipend amount you enter will be split into monthly payment instalments based on the 'start' and 'end' dates you choose. This form does not calculate pro-rata payments.
First Stipend Amount	<input type="text" value="1500"/>
First Stipend Account Code	<input type="text" value="500475.100.156782.22043"/>
First Stipend Sponsor Code	<input type="text" value="03"/>
First Stipend Sponsor Text	<input type="text"/>
Date Guidance	Please only amend the 'start' and/or 'end' date if you do not want to pay the stipend over 12 equal monthly instalments. You can amend both the 'start' and 'end date' if you want fewer payments, but the system will only permit payments over consecutive months. Payments dates are set for the 1st day of each month, in advance. The earliest start/payment date is 1st Oct. If you want an immediate payment, and it is more than 11 days from your input date until the next payment date, choose the 1st of the current month. Please see the 'payments section' of the 'Form S User Guide' for more information on how instalments are calculated.
Start date for the period of the studentship	<input type="text" value="23/Sep/2019"/>
End date for the period of the studentship	<input type="text" value="22/Sep/2020"/>

Notes
These notes are to be used for information purposes by the department.
They will not be acted upon because this is an automated process.
Please avoid the use of commas. (Max. size 225 characters.)

225 more characters available.

Approval by Departmental Authorised Signatory Approved Rejected

Input your Approved or Rejected decision and then Click Store

The project codes are validated by date and the dates entered also influence the stipend

instalment schedule – please refer to section 2.8 of this document.

3.8 Complete Bid

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



The OK button returns you to the Student Finance 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 payment schedule. If there are any errors with the payment schedule please contact sfostaffenquiries@ucl.ac.uk

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.

4.1 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:

Student Finance Management

The screenshot shows a navigation menu titled 'Departmental Fund Management'. It contains several links: 'Form input', 'Departmental approval', 'Departmental bid review', and 'UCL studentships full process documentation'. An arrow points to the 'Departmental bid review' link, indicating it is the current step in the process.

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

Student Profile

The screenshot shows a search form titled 'Student Profile'. It includes a dropdown menu for 'Year *' with '2019/20' selected. A 'Search' button is located at the bottom right of the form.

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.

The screenshot shows a table titled 'Fund Application Bid data'. It displays a list of bids with columns for 'Select this bid', 'Student Code', 'Surname', 'Forename', 'First Tuition Code', 'First Stipend Code', 'Dept Appr', and 'Fin Appr'. The table shows two rows of data, each with a 'select this bid' button and 'Yes' buttons for 'Dept Appr' and 'Fin Appr'.

Select this bid	Student Code	Surname	Forename	First Tuition Code	First Stipend Code	Dept Appr	Fin Appr
<input type="button" value="select this bid"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	518723.100.156417.22	518723.100.156417.22	<input type="button" value="Yes"/>	<input type="button" value="Yes"/>
<input type="button" value="select this bid"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	525728.100.156780.22	525728.100.156822.22	<input type="button" value="Yes"/>	<input type="button" value="Yes"/>

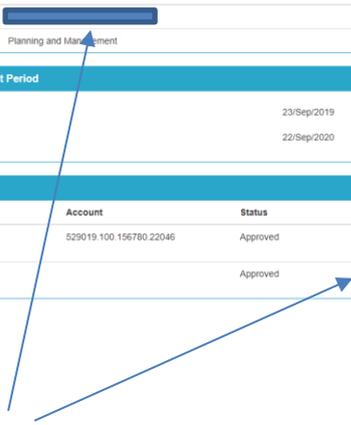
3. To view a bid, click on 'select this bid' to the left of the list. Each page will list ten bids.

Student	
Name	[Redacted]
Number	[Redacted]
Status	Enrolled
Course	RRDCENSING01
Dept	Chemical Engineering
Year	2019

Bid Signatories			
	Assigned To	Status	Date
Dept	[Redacted]	Approved	20/Aug/2019
Finance	Planning and Management	Approved	21/Aug/2019

Studentship Payment Period	
Start	23/Sep/2019
End	22/Sep/2020

Tuition Fee						
	Amount	Account	Status	Approver	Source	Transaction(s)
1st	£5,210.00	529019.100.156780.22046	Approved	[Redacted]	979999 Discretionary	£5,210.00 - 01/Oct/2019
2nd			Approved	[Redacted]		



Name and email of the approver can be found here.

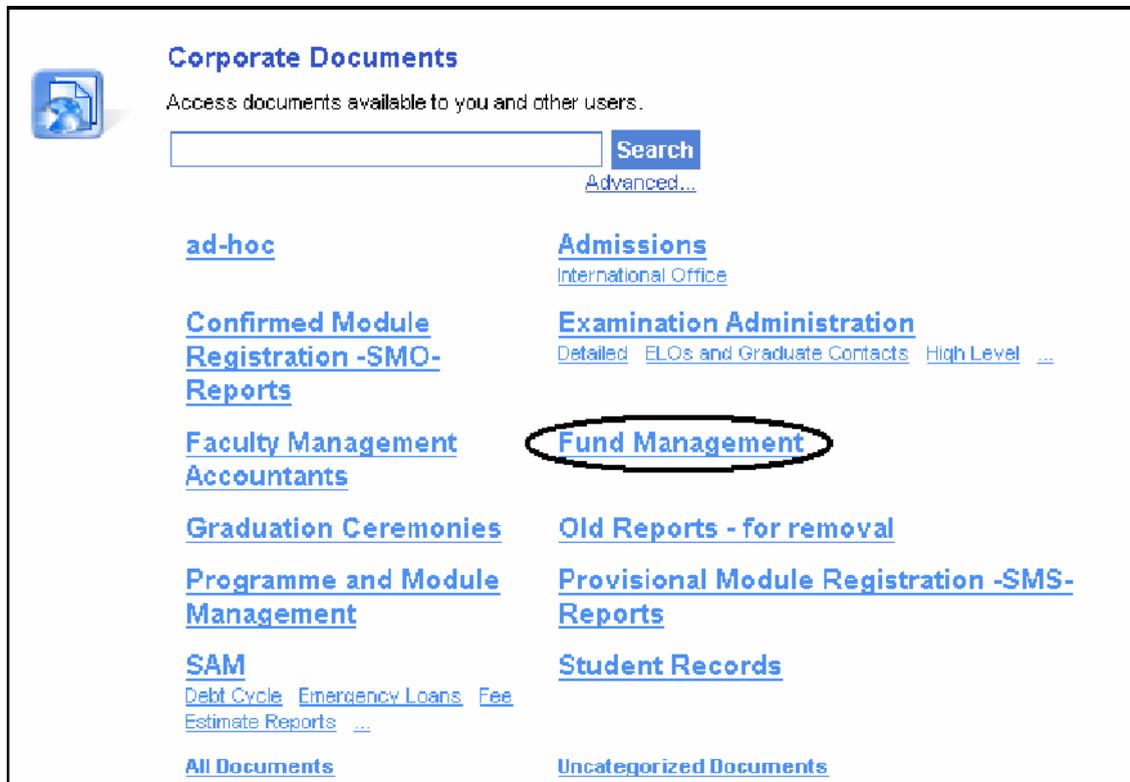
PORTICO Reports (not this was unavailable for screenshots when updating this form CH 12/2/2020)

1. Log into PORTICO reports by clicking on the + in top right hand corner and then to 'Portico Services Reports' of the staff front page.

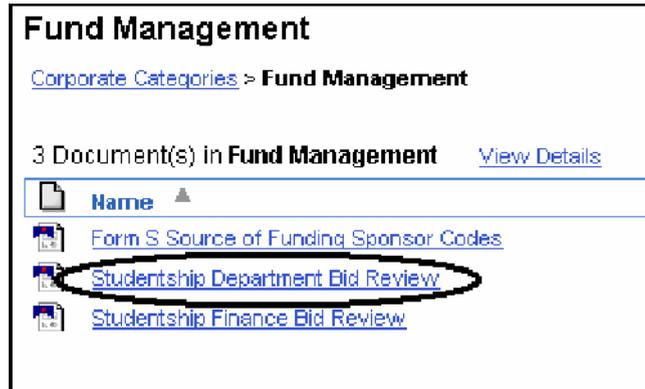


If the reports container does not appear, please contact PORTICO Services.

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. (screenshot needs updating)



3. To run the report to review your department's bids click on 'Studentship Department Bid Review' (screenshot needs updating)



4. You will be prompted to enter parameters to the run the report. (screenshot needs updating)

The screenshot shows a form titled "Studentship Department Bid Review" with a yellow background. At the top, it says "Reply to all prompt(s) before running the query." Below this are five input fields, each with a "Show Values" button to its right:

- Enter Academic Year or %
- Enter Account Code or %
- Enter Department Name (can select more than 1 or %)
- Enter Student Code or %
- Enter Student Name or %

At the bottom right of the form are two buttons: "Run Query" and "Cancel".

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.

A screenshot of a web form. At the top left, there are two buttons: 'Save' (circled in red) and 'Send'. Below them is a text input field containing 'UCL Studentship Bids'. Underneath that is another text input field containing 'COMPUTER SCI'. To the right of this field is a small numeric input field containing the number '3'.

(screenshot needs updating)

7. Use the radio buttons to select your preferred format and then click on the computer icon to save the document to your computer.

A screenshot of a dialog box titled 'Studentship Department Bid Review'. Below the title, it says 'To save this document, select one of the actions below:'. There are two main options, each with a blue circular icon. The first option is 'Save as a personal document' with a folder icon and the text 'Save this document to InfoView for your personal use.' The second option is 'Save to my computer' with a computer icon and the text 'Save this document to your computer as:'. Under this second option, there are three radio buttons: 'Microsoft Excel format (.xls)' (which is selected), 'PDF format', and 'BusinessObjects document (.rep)'. At the bottom left of the dialog box is a 'Cancel' button.

(screenshot needs updating)

5. Cancelling or Reducing a Bid

If you wish to cancel or reduce a bid, e-mail Student Funding at sfostaffenquiries@ucl.ac.uk

You will 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

- 6.1 **Receive e-mail** notifying you of bids awaiting approval in the Student Finance Management container.
- 6.2 **Go to the PORTICO website** at: www.ucl.ac.uk/portico. PORTICO uses your main UCL ID.
- 6.3 **Select the Section 'Student Finance Management'** from the left hand list of links. In the 'Finance Fund Management' container select the 'Finance approval' link:

Student Finance Management

Departmental Fund Management

This container allows access to Departmental Fund Management Options.

Form input

Departmental approval

Departmental bid review

UCL studentships full process documentation

Finance Fund Management

This container allows access to Finance Fund Management Options.

Finance approval 

6.4 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 view a bid.**

Finance Approval Bid Selection

Fund Application Bid data								
Now showing records 1 - 7 of 7								
Select this Bid	Student Code	Department	Surname	Forename	Bid Year	First Tuition Code	Second Tuition Code	First Stipend Code
select	[redacted]	CANCER INST	[redacted]	[redacted]	2019			502306.100.156780.22
select	[redacted]	CHEMICAL ENG	[redacted]	[redacted]	2019	505882.100.156782.22		

6.5 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:

Student					
Name	[Redacted]				
Number	[Redacted]				
Status	Time Ltd Enroltd				
Course	TMSCPESYR18				
Dept	Chemical Engineering				
Year	2019				

Bid Signatories		
Assigned To	Kathryn Le Lion - k.lion@ucl.ac.uk	
Dept	Planning and Management	
Finance	Planning and Management	
Status	Approved	

Studentship Payment Period	
Start	23/Sep/2019
End	21/Sep/2020

Tuition Fee					
Amount	Account	Status	Approver	Source	
1st	£7,500.00			505882.100.156782.22046	979999 Sponsorship
2nd					

Stipend					
Amount	Account	Status	Approver	Source	
1st					
2nd					

Notes

Options
What would you like to do?
<input type="radio"/> Fully approve the whole bid without any amendments <input type="radio"/> Amend bid and/or partially approve <input type="radio"/> Reject this bid <input checked="" type="radio"/> 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.

Form S rejected - Send Email to Form S Inputter

You have decided to reject this bid. Please provide a reason for the rejection of this bid in the box at the bottom of this page, then click **SEND EMAIL**. The email will be sent to the Form S Inputter shown in summary below.

Financial Approver Review of Bid
Depending on how far the bid has progressed, some rows may not display any data

Departmental Signatory Name	Clare Hewitt
Departmental Signatory Email Address	chewitt@ucl.ac.uk
Student Code	[Redacted]
Name	[Redacted]
Student Status	ENROLLED
Academic Year	2019
Course	PROCOMSING01
Department	Computer Science
First Tuition Amount	
First Tuition Account Code	
First Tuition Finance Approval	
First Tuition Finance Approver	
Second Tuition Amount	
Second Tuition Account Code	
Second Tuition Finance Approval	
Second Tuition Finance Approver	
First Stipend Amount	£1,000.00
First Stipend Account Code	500475.100.156782.22043
First Stipend Sponsor Code	08 (British Academy)
First Stipend Finance Approval	
First Stipend Finance Approver	
Second Stipend Amount	
Second Stipend Account Code	
Second Stipend Sponsor Code	979999 (Other sponsor type - please enter name)
Second Stipend Sponsor Text	Danamas
Second Stipend Finance Approval	
Second Stipend Finance Approver	
Current Type of Finance Approval	Planning and Management
Start date for the period of the studentship	23/Sep/2019
End date for the period of the studentship	21/Sep/2020
Notes	
Approval by Departmental Authorised Signatory	Approved
Date of Departmental Approval	Rejection 12/Feb/2020
Overall Finance Approval	
Date of Finance Approval/Rejection	
First Tuition Transaction	
Second Tuition Transaction	
First Stipend Transaction	
Second Stipend Transaction	

Please enter your reason for rejecting this bid in the box below:

[Text Input Field]

SEND EMAIL

6.6 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.

Financial Approval

Student Details

Student Code	<input type="text"/>
Name	<input type="text"/>
Student Status	TIME LTD ENROLL
Academic Year	2019
Course	TMSCPESYR18
Department	Chemical Engineering

Code Amendment Selection

Please select any code group that you wish to amend then press **Continue**. Only codes that have not already been approved are available for amendment.

First Tuition Amount	£7,500.00
First Tuition Account Code	505882.100.156782.22046
First Tuition Sponsor Code	979999 (<<<<@U_FM_FEE_SRC_FNR_TU1_2>>&GOTY_NAME.OTYSRS>>)
First Tuition Sponsor Text	Sponsorship

Amend FIS code or sponsor (where applicable)? Yes No

[Continue](#)

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

6.7 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.

My Portfolio Admissions Awards, Assessments and Achievements C2R3 Home Curricular Management Engagement Monitoring [Graduation Ceremonies - Staff Application](#) Student Finance Management [+](#)

Logged in: Claire H

Financial Approval, Code Amendment

Please update the following code group(s) that you have selected to amend, starting with the Project code, and then press **Validate**.
When you have completed all your changes click **Continue**.

Student Details

Student Code	<input type="text"/>
Name	<input type="text"/>
Student Status	TIME LTD ENROLL
Academic Year	2019
Course	TMSCPESYR18
Department	Chemical Engineering

	Project	Task	Award	Exp. Type
First Tuition Amount	£ 7,500.00			
First Tuition Account Code	<input type="text" value="505882"/>			<input type="text" value="22046"/>

[Click Here to find a Project Code](#)

[Validate](#) [Continue](#)

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 select that and validate. Then 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)

6.8 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:

Financial Approval - Source of Funding Code Input

Please update any Source of Funding Code that you wish to amend then click **Continue**.

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

6.9 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

6.10 Tuition and Stipend Amounts, Studentship dates, Payment Instalments, 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.

Student Details

Student Code	
Name	
Student Status	TIME LTD ENROLD
Academic Year	2006-2007-2008-2009-2010-2011-2012-2014-2017-2015-2013-2016-2018-2019
Course	TMSCPESYR18
Department	Chemical Engineering
Total Tuition Fee	£ 7500

If you consider that the Total Tuition Fee stated is incorrect, please consult the [Fees Matrix](#).
See the [Student Budget Calculations](#) for minimum stipend amounts for full time students.

Additional Information

Please fill in the information for the student you have selected

First Tuition Amount	7500
First Tuition Account Code	503930.100.156822.22046
First Tuition Sponsor Code	979999
First Tuition Sponsor Text	Sponsorship xx
First Tuition Finance Approval	<input checked="" type="radio"/> Approved <input type="radio"/> Rejected <input type="radio"/> No Approval Entered
Change between Research Administration and Planning and Management (if necessary)	<input checked="" type="radio"/> Planning and Management <input type="radio"/> Research Administration (Sponsored Research) <input type="radio"/> Research Administration (Doctoral Training)
Start date for the period of the studentship	23/Sep/2019
End date for the period of the studentship	21/Sep/2020

Notes
These notes are to be used for information purposes by the department.
They will not be acted upon because this is an automated process.
Please avoid the use of commas. (Max. size 225 characters.)

225 more characters available

(Note in this view the student only has tuition but it could show tuition and stipend)

Select the radio button to approve or reject each tuition and stipend bid. You can also re-assign the bid to School Finance, or Research Services/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.

IMPORTANT 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 project codes are validated by date and the dates entered also influence the stipend instalment schedule – please refer to section 2.8 of this document.

6.11 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 where pressing OK .

Student						
Name	[Redacted]					
Number	[Redacted]					
Status	Time Ltd Enrolld					
Course	TMSCPESYRI16					
Dept	Chemical Engineering					
Year	2019					

Bid Signatories			
Assigned To	Status	Date	
Dept Kathryn Le Lion - k.lion@uct.ac.uk	Approved	10/Dec/2019	
Finance Planning and Management	Approved	23/Jan/2020	

Studentship Payment Period	
Start	23/Sep/2019
End	21/Sep/2020

Tuition Fee						
	Amount	Account	Status	Approver	Source	Transaction(s)
1st	£7,500.00	503930.100.156822.22046	Approved	Clare Hewitt c.hewitt@uct.ac.uk	979999 Sponsorship xx	£7,500.00 - 01/Oct/2019
2nd						

Stipend						
	Amount	Account	Status	Approver	Source	Transaction(s)
1st						
2nd						

Notes						

Pressing 'ok' will take you back to the list of bids that still need processing.

6.12 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.

Finance Approval or Rejection Complete

Full Details shown below

Student

Name	[REDACTED]
Number	
Status	Enrolled
Course	RRECOMBIN01
Dept	Computer Science
Year	2019

Bid Signatories

	Assigned To	Status	Date
Dept	Ben Nicholson - sbstaffenquiries@uct.ac.uk	Approved	04/May/2020
Finance	Planning and Management	Approved	05/May/2020

Studentship Payment Period

Start	23/Sep/2019
End	22/Sep/2020

Tuition Fee

	Amount	Account	Status	Approver	Source	Transaction(s)
1st			Approved	Clare Hewitt sbstaffenquiries@uct.ac.uk		
2nd			Approved	Clare Hewitt sbstaffenquiries@uct.ac.uk		

Tuition Fee

	Amount	Account	Status	Approver	Source	Transaction(s)
1st			Approved	Clare Hewitt sbstaffenquiries@uct.ac.uk		
2nd			Approved	Clare Hewitt sbstaffenquiries@uct.ac.uk		

Stipend

	Amount	Account	Status	Approver	Source	Transaction(s)
1st	£1,500.00	000475.100.156782.22043	Approved	Clare Hewitt sbstaffenquiries@uct.ac.uk	03	£125.00 - 01/Oct/2019 £125.00 - 01/Nov/2019 £125.00 - 01/Dec/2019 £125.00 - 01/Jan/2020 £125.00 - 01/Feb/2020 £125.00 - 01/Mar/2020 £125.00 - 01/Apr/2020 £125.00 - 01/May/2020 £125.00 - 01/Jan/2020 £125.00 - 01/Jun/2020 £125.00 - 01/Jul/2020 £125.00 - 01/Aug/2020 £125.00 - 01/Sep/2020
2nd			Approved	Clare Hewitt sbstaffenquiries@uct.ac.uk		

Notes

OK

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.

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

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

MR #####

SN: 181#####

Department: Computer Science

04/May/2020

Dear Mr ####,

UCL Studentships 2019/20

I wish to confirm that you have been awarded a UCL Studentship / Funding for postgraduate work in the Department Computer Science.

Funds payable in academic year 2019/2020 are as follows:

Tuition Fee:

£1,855.00

Stipend 1:

IMPORTANT: Your October stipend will be paid the first week of Term 1 provided you are fully enrolled. Alternatively, your first payment date will be within either 10 working days of the date of your enrolment/re-enrolment, the date of this email OR the date which you have entered your UK bank details into Portico – whichever date is latest.

Where payment dates fall on a weekend or bank holiday you will be paid on the last working day before your payment date.

The 1 January payment will be paid the week before UCL closes for the Christmas break.

If you commence your studies part-way through the academic year, the dates listed below may be subject to change. If any of the dates are in the past, payment will normally be made within 10 working days of the date of this email, provided you are fully enrolled and have entered your bank details into Portico.

If the stipend or fee amount sections are blank, please contact your Departmental Administrator at the bottom this email immediately as this signifies that the payment request was not processed correctly and no payments will be made.

£83.37 01/Oct/2019

£83.33 01/Nov/2019

£83.33 01/Dec/2019

£83.33 01/Jan/2020

£83.33 01/Feb/2020

£83.33 01/Mar/2020

£83.33 01/Apr/2020

£83.33 01/May/2020

£83.33 01/Jun/2020

£83.33 01/Jul/2020

£83.33 01/Aug/2020

£83.33 01/Sep/2020

Method of Payment:

Your award will be paid directly into your UK bank account. Please ensure the below has been completed in order to receive your payment:

A) You have logged your UK bank details online through Portico at least two weeks prior to the payment due date, or

B) You have submitted your UK bank details into Portico in a previous academic year.

Please note that payments will only be made directly into UK bank accounts. Cheques will no longer be issued for stipend payments

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.

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

If your enrolment status changes from 'Enrolled' for any reason during the academic year then the payment of your stipend may be affected.

If you have any queries regarding your enrolment or tuition fees, 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.

If you have any queries regarding the above, or require any further confirmation of your award, please contact the person who processed your studentship:

KARA Regan

Department: Computer Science

Email: sfostaffenquiries@ucl.ac.uk

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

7.2 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: Computer Science

20/Nov/2019

Dear Dr Student,

UCL Studentships 2019/20

You have been awarded a UCL Studentship for postgraduate work in the Department Computer Science.

The value of your studentship is:

Tuition Fee:

£2,605.00

If you have any queries regarding the above, please contact the person who processed this award:

XXX XXX

Department: Computer Science

Email: xxxxx@ucl.ac.uk

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

END.

If you have any questions or feedback on this guidance please contact the Student Funding team via sfstaffenquiries@ucl.ac.uk