

# ESRC specific Guidance Notes for using the Je-S Studentship Details functionality

Please read these notes in conjunction with the Je-S helptext that can be found under the 'Help' hyperlink in the top right hand corner of each Je-S screen.

All Research Councils use the Studentship Details functionality within Je-S (formerly known as the Student Data Portal or SDP) which is a web-based data collection system which Research Organisations (ROs) use to return and maintain details of the students and student research projects funded from Doctoral Training Grants (DTGs).

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## Research Organisation responsibility

In most cases, the requirement is for student details to be submitted through Je-S within one month of the student commencing their studies and for the record to be maintained in a timely manner, including an annual update of information using the "Batch Update" facility. There will be times when amendments need to be made to an individual studentship award over the course of the funding period. Research Organisations will generally be given authority to approve changes in certain circumstances subject to notifying the ESRC of these changes through Je-S. As with new records, the record should be submitted once details have been updated. It is important that records are maintained in a timely manner and it should be noted that information provided by the Research Organisation will be used as part of the Financial Expenditure Statement (FES) process.

It is normally the responsibility of the Research Organisation where the award has been made (also normally the funding organisation) to submit details and maintain the record. The Research Organisation can set up pools of people who are able to add student records on

Je-S. When a record is completed it is submitted to a submitter pool. Research Organisations are strongly encouraged to establish a two-stage process incorporating approver and submitter pools in order to improve the quality assurance of the submitted data to the Research Council.

The person responsible for setting up the pools is known as the RO Master ID. (See also the general Je-S guidance on setting up pools).

### How to create a new student record

Log into Je-S as normal: <https://je-s.rcuk.ac.uk/JeS2WebLoginSite/Login.aspx>

1. Click on '**Documents**' under the Account heading on the left hand side of the screen. You will be taken to a new screen.
2. Under 'Functions' click on '**New Document**' under the 'Create' subheading.
3. You will be taken to a new screen, 'Add New Document'.

You will see a selection of drop down boxes. Please select: Council: **ESRC** Select Document Type: **Studentship Details** (if you do not see this document type please contact the RO Master ID).

4. You will be taken to another screen, 'Create Document'.

There is a help text page which explains each of these categories in more detail. This can be found in the top right hand corner of the screen. Please click on the '**Help**' link to access further information.

From the dropdowns, please select:

Council: **ESRC**

Please only **select one** option under 'Category' referring to the guidance below to determine which category to choose.

Category: **ESRC CASE studentships (NEW)**  
**ESRC Masters (Targeted) Studentships (NEW)**  
**ESRC MRC Interdis Studentships (NEW)**  
**ESRC NERC Interdis Studentships (NEW)**  
**ESRC Project Linked Studentships (NEW)**  
**ESRC Standard Competition Studentships (NEW)**  
**ESRC Standard Research Studentship (Quota) (NEW)**

**ESRC CASE studentships:** CASE awards are intended to encourage and develop collaboration and partnerships between Higher Education Institution (HEI) departments and non-academic organisations. This should be selected for any CASE-style Doctoral Training Centre (DTC) studentships that have co-funding from non-academic organisations. *Please note that any studentship that is co-funded with another Research Council or another Research*

Organisation should NOT be submitted under this call but rather the Standard Research (Quota) call.

**ESRC Masters (Targeted) Studentships:** ESRC only funds Masters studentships as part of a strategic initiative. *Please do not submit any student details against this call unless there is a specific call announced and the guidance notes explicitly state that this may be used.*

**ESRC MRC Interdis Studentships:** These are jointly funded studentships between the ESRC and MRC. They are typically individual studentships awarded through a specific competition. *Please do not submit any student details against this call unless explicitly advised to do so*

**ESRC NERC Interdis Studentships:** These are jointly funded studentships between the ESRC and NERC. They are typically individual studentships awarded through a specific competition. *Please do not submit any student details against this call unless explicitly advised to do so.*

**ESRC Project Linked Studentships:** These are studentships that have been awarded as part of a grant proposal and the funding for the studentship is provided on the grant. If entering project linked student details please ensure that a grant maintenance request has also been submitted against the relevant training grant to request the funds to be added. Please note, funds will not be automatically added and failure to submit a grant maintenance request in a timely manner may result in the costs not being reimbursed.

**ESRC Standard Competition Studentships:** These are studentships that are awarded through an open competition. *Please do not submit any student details against this call unless there is a specific call announced and the guidance notes explicitly state that this may be used.*

**ESRC Standard Research Studentship (Quota):** The majority of ESRC studentships are allocated via an algorithm to Research Organisations that have been accredited to receive ESRC studentships. These students are funded by the RO's Doctoral Training Grant and the studentship is administered by the University. This should be selected for all new studentships awarded through a Doctoral Training Centre except for co-funded studentships with non-academic organisations which should be submitted under the ESRC CASE studentship call (see call above).

**HUSID: This is not mandatory at this stage** but if you do have this information at this stage please enter it.

**NUMHUS: This is not mandatory at this stage** but if you do have this information at this stage please enter it.

Please note these two new fields become mandatory for student records more than one year old.

Research Organisations reporting studentships who do not know who is responsible in their organisation for generating the HESA student identifiers can contact the HESA liaison team at [liaison@hesa.ac.uk](mailto:liaison@hesa.ac.uk)

Start Year-Academic: **This is mandatory.** Please select the most appropriate year.

Your Reference: **This is mandatory if you cannot provide HUSID and NUMHUS numbers**

Student Reference: **This is mandatory if you cannot provide HUSID and NUMHUS numbers**

Registration/Appointment Date: **This is mandatory.** Past dates are accepted.

Students may start to receive training account funding part way through their research, provided the funding meets the grant conditions. The start date should reflect the date on which the student started their studies, rather than when training funds began to be used.

Click on '**Next**'.

The following instructions are listed in the order of the headings showing in the portal

### Selecting a Person

The **Create Document** screen requires you to complete a number of details relating to the student who has taken up the studentship. When a new student is starting, they are unlikely to have an existing record in Research Council Systems. Click on **Select Person** and this will take you to the **Je-S Person Search** screen where you will be able to carry out a search by typing the surname and optional initials to see whether the student already has an existing Je-S record:

- If the relevant record exists, click on any part of the row and the fields in page two of the Create Document screen will be automatically populated with the details including the **Research Council Person ID** for the individual. Please ensure that any remaining blank fields are completed before you click on **Create**. In addition, you can update details and click on the **Save** option at the top of the screen.
- If no results are found you should click on **Add New Person** and complete the fields as required. Please note the address details should be based on the student's main address (normally work address). This is the address that will be used for all correspondence with the student by the Research Council throughout the duration of the award. At minimum, you must include a first line, town or city and country and if the UK is selected you must also provide a postcode. Note that commas should be omitted from the address. An email address is essential so that the Research Council can contact the student about Research Council-funded courses or events and should be included as mandatory. If a student has more than one email address, the primary one that is in most use should be given. Once completed, click on **Save**. You are then required to complete further information relating to **Date of Birth, Gender, Ethnic Origin, Nationality** and **Disability** as appropriate. Please note, as a funder ESRC has a responsibility to monitor and report on the demographic breakdown of the students it funds. As such, it is essential that this information is completed as accurately as possible. Once completed, click on **Create** and this will take you to the main **Document Menu** screen.

After a student is selected, a number of the text fields are automatically populated with their personal information. If this information is incorrect, the student will need to contact Je-S helpdesk to amend their personal details. The ESRC is unable to do this.

Disability Ind: **This is mandatory.** If you select 'Yes' please include details.

Click on '**Create**'.

### **Completing a newly created record**

From this point onwards use the **Document Menu** sidebar on the left of the screen to navigate the document to complete the remainder of the record. You will need to click on each menu item individually, in turn. Each time you will be taken into separate screens and asked to complete the necessary details and click **Save**. This will then return you to the **Document Menu** in order that you can select the next menu item to be completed. Each item is mandatory unless otherwise specified. **Cancel** returns to the **Document Menu** without saving any changes made since the last save.

### **Degrees/Relevant Experience**

It is the responsibility of the Research Organisation to ensure that students funded from Research Council Training Grants fully meet the eligibility requirements. Please see the ESRC [Postgraduate Funding Guide](#) for more information on this.

For a newly created person, you should click on **Edit Qualifications** and then click on **Add Qualifications**. Click on Select Organisation and this will take you to the **Je-S Organisation Search** screen where you will be able to carry out a search by typing part of or the entire awarding organisation name. Click on any part of the row of the relevant record and information will automatically populate in the **Add New Qualification** screen.

Provide details of the **Year Awarded** using the drop down list of options and click on the appropriate **Qualification Level** from the three options available. Select the **Qualification Type** using the drop down list of options. **Qualification Subject** requires you to classify details under a general category and then a specific subject area. You can carry out a search by typing part of the subject. Alternatively you can assign the two categories by using the drop down list of options. Confirm the **Qualification Class** using the drop down list of options. Finally, provide a **Qualification Description** in the free text box as appropriate. This field is not mandatory in most cases but you should provide further information where **Foreign Qualifications** or **Other** has been selected under **Qualification Class**. Once completed, click on **Save** and this will take you back to the **Qualifications** screen.

Repeat this process as necessary to add any further qualifications by clicking on the **Add Qualifications** option. In addition, **Edit** and **Delete** functionality is available to you if you wish to make amendments to the existing qualification records. Once completed, click on **Back to Document** and this will take you to the **Degrees/Relevant Experience** screen.

From the qualifications listed indicate in the box available which are relevant to the current course of study. The **Other Relevant Experience** section should be used to provide information relating to the **Number of Years** and **Description of Experience** for the

student. If no qualifications are found, please include details or any 'other relevant experience'. This section will not validate without either qualifications or experience details being entered.

Click on **Save** once details have been completed.

## Researcher Training Dates

**Researcher Training Dates** will automatically populate the **Registration/Appointment Date** field with details that you have previously supplied (ie it will show the date the student started which may not necessarily be when the training funds began to be used). In addition you need to confirm the **Funding End Date** from the drop down list. The **Expected Submission Date** will automatically pre-populate (using Research Council specific rules – see below) ie it will default to the norm, but it can be overridden if necessary in exceptional circumstances e.g. part time student.

**The ESRC expects that if a student is undertaking a Masters followed by a PhD there should be no gaps between completing the Masters training and starting the PhD. Study breaks are not allowed.**

Funding Start/End dates refers to the overall length of the studentship ie **the funding period**.

Course Start/End Dates refers to the dates of any Masters training and should be used for those students on a 1+3 type award.

PhD Start/End Dates refers to the dates of the PhD funding period.

Expected Submission Date: This is calculated as one year after the PhD End Date for full-time students, please amend for part-time students.

**Please note, the funding end date and the PhD end date should be the same date. The expected submission date should always be at least one year after the funding and PhD end dates.**

*Example for a 1+3 studentship:*

Funding Start Date:	01/10/2015
Funding End Date:	30/09/2019
Expected Submission Date:	30/09/2020
Course Start Date:	01/10/2015
Course End Date:	30/09/2016
PhD Start Date:	01/10/2016
PhD End Date:	30/09/2019

## Termination Details

Should be used to record details of all students that commence Research Council funded studentships but then subsequently terminate their studies or research

programme prematurely (for whatever reason). Details must be completed for all terminated studentships regardless of the length of time the studentship was held. In all cases, please provide confirmation of the **Termination Date** and **Termination Reason** from the drop down lists.

If **Other** is selected as a **Termination Reason** you are required to provide further information in the free text box available. *Note – termination does not include students that complete their studies in full but earlier than their original end date, in which case, the funding end date can be amended.*

## **Funding Details**

Please select the **Academic Year** from the drop down menu. Initially, this should be the academic year in which the studentship commenced (ie normally the current academic year) but please note that on an annual basis you will also be required to provide information for each academic year throughout the duration of the studentship.

Please write in the text box the **Full Time** percentage the student is working on their studies. *For full time students this will be 100 per cent and for part-time students this will be a minimum of 50 per cent.*

If the student is **Fees Only**, tick the box

Details of the **Annual Stipend** received by the student should be the total amount for the academic year including any contributions from other funders where applicable but excluding all project partner contributions detailed under **Project Partner**.

Please state the fees paid for the academic year.

**Increased funding: This should be ticked for students in receipt of an enhanced stipend for Economics or Advanced Quantitative Methods (AQM).**

Studentships can be funded from different Research Councils. Please include the percentage of co-funding from other Councils is appropriate.

**If there is no co-funding please write '100%' in the ESRC box**

Once you have completed the above details click **Save** and this will take you back to the initial **Funding Details** screen where a box displaying a summary of the funding details that you have provided for the current academic year will be available. **Edit** and **Delete** functionalities are available for you to click on if appropriate. If no amendments are required to the record click on **Back to Document Menu** and this will take you back to the **Document Data** list.

## **Project Details**

Please detail the student's project title and a summary of their proposed project.

Whilst those students undertaking a 1+3 type studentships may not have finalised the details of their PhD yet it is essential that the information provided is as complete and relevant as possible, ie please avoid inputting 'to be confirmed'.

Provide a plain English and sufficiently detailed summary of the work that the student is undertaking so that the Research Council has a clear overview of the work it is funding. From the details provided, the Research Council must be able to easily identify that the project is within its remit and is in line with the scheme under which it was awarded. In addition, the Research Council must be able to easily code the project against various scientific classifications. There is a character limit of 150 on the title and 4,000 on the summary including spaces and punctuation.

Please ensure that the summary is written in a format that could be used to publicise ESRC funded research to a variety of readers eg policy makers, the general public or wider research community. Please note that this section may be made available on the Gateway to Research database at some point in the future, therefore students should ensure confidential information is not included in this section.

## **Research organisation**

**Research Organisation** requires you to complete a number of details. Under each of the following headings, options to **Edit** and **Delete** information will be available to you. You can use these as necessary by clicking on the appropriate option. In addition, clicking on the **Add** functionality will allow you to provide multiple details to the record.

Details should be completed for each organisation (excluding Project Partner Organisations) involved in the studentship ie primarily academic/ Research Council Institute organisations.

Firstly, click on **Add Organisation** to complete details of the organisation that was awarded the studentship by the Research Council. This may not necessarily be the same organisation where the student is registered, working or funded therefore the facility allows multiple organisations to be added to the record.

Please select the correct **Department** from the Je-S search function.

Please enter the student's **Start and End Dates** at the Organisation.

Tick the relevant boxes to show if the Organisation is the **Degree Awarding or Submitting Organisation**.

Please select the correct **Supervisors** from the Je-S search function. If no results are found you should click on **Add New Person** and complete the fields as required. Once completed, click on **Save** and this will take you to the research organisation screen.

Against the appropriate supervisor record, click on the available field to confirm the student's **Main Supervisor**. Once completed, click on **Save** and this will take you to the **Research Organisation** screen.



The **Alternative Contact** field allows you to complete details of an alternative contact using the **Je-S Person Search** facility. This option is available for all records but is only mandatory if there is no formal supervisor based at the Research Organisation.

Please select the **Training Grant** that this studentship will be funded from. Please note, studentships funded through a DTC must be linked to the DTC's training grant (**the grant reference number for a DTC will begin with 'ES/J5'**) and must not be linked with transitional training grants (the grant reference number for a transitional training grant will begin 'ES/I9'). Enter in the start and end dates of the funding. You can add further Grants in future updates to the system.

Once completed, click on **Save** and this will take you to the main **Document Menu** screen.

## **Project Partner**

Project Partner Organisation details should be completed for all non-Research Organisations involved in the award ie those not listed under Research Organisation Details.

**This section is not mandatory.** Only complete this section if the studentship has co-funding from a non-academic organisation or business eg following a **CASE funded approach**.

Please select the **Organisation and Department** from the Je-S search function. If no organisation results are found you should click on **Add New Organisation** and complete the fields as required.

Confirm details of the **Start Date at Project Partner** and **End Date at Project Partner** for the student by using the drop down list of options.

Certain fields will automatically be populated.

Please complete the text boxes with the **Organisation's cash/in kind contribution** to the department and student.

Please detail the work to be carried out at the project partner, including the nature and frequency of contact in the free text box.

The **Alternative Contact** field allows you to complete details of an alternative contact using the **Je-S Person Search** facility. This option is available for all records but is only mandatory if there is no formal supervisor details based at the **Project Partner Organisation**.

Once completed, click on **Save** and this will take you to the Project Partner Organisation screen. If no further entries are needed, click on the **Back to Document Menu** option.

## **Ethical Information**

It is the responsibility of Research Organisations to ensure that the appropriate ethical mechanisms are in place. The ESRC has its own Framework for Research Ethics ([http://www.esrc.ac.uk/\\_images/framework-for-research-ethics\\_tcm8-33470.pdf](http://www.esrc.ac.uk/_images/framework-for-research-ethics_tcm8-33470.pdf)) which should be consulted by Research Organisations. Research Organisations should ensure that proper consideration has been given to any ethical issues that the research project may raise.

Where an ethics review is yet to be undertaken, please select 'NO' along with a statement explaining how any issues will be addressed.

## Document Header

This will be automatically populated within the information collected at the beginning of the form. **After one year, HUSID and NUMHUS numbers automatically become mandatory. Please ensure you remember to complete this information.**

## Proposal Classifications

Please select at least one research area to describe the subject area in which the programme of study falls. If you select multiple areas, you are required to identify one of these as the primary area. You may use the Qualifiers section to indicate the approach or geographic dimensions relevant to the studentship. Please note a time period is a mandatory qualifier for History. The use of keywords is optional for studentships.

Please ensure that the primary discipline is a social science. ESRC funding should only be used to support studentships that are at least 50 per cent social science. For further information please see our website: <http://www.esrc.ac.uk/funding-and-guidance/applicants/proposal-classifications-ESRC-disciplines.aspx>.

## How to update studentship details on Je-S

The requirements to report studentship amendments on Je-S are outlined in the Postgraduate Funding Guide: [http://www.esrc.ac.uk/\\_images/esrc-postgraduate-funding-guide-dtc\\_tcm8-32257.pdf](http://www.esrc.ac.uk/_images/esrc-postgraduate-funding-guide-dtc_tcm8-32257.pdf)

Log into Je-S as normal. <https://je-s.rcuk.ac.uk/JeS2WebLoginSite/Login.aspx>

1. From the **Je-S Home Page** click on **Documents** under the **Account** heading located on the left hand side of the screen.

Click on '**Documents**' on the left hand side of the screen

2. You will be taken to a new screen. Under the 'Students' heading click on **Studentship Details**.

If you do not see a document type of "Studentship Details" available to you, you will need to contact the RO Master ID.

3. **Tick the box to 'show documents submitted to Council'**

This will show all of the students associated with the Doctoral Training Grants at your institution.

4. Click on '**Open**' to open up the Je-S record for individual students.

Make any necessary amendments as explained in the Postgraduate Funding Guide:  
[http://www.esrc.ac.uk/\\_images/esrc-postgraduate-funding-guide-dtc\\_tcm8-32257.pdf](http://www.esrc.ac.uk/_images/esrc-postgraduate-funding-guide-dtc_tcm8-32257.pdf).

### How to create a grant maintenance request

There will be occasions when changes need to be made to the Training Grant, please see the Postgraduate Funding Guide ([http://www.esrc.ac.uk/\\_images/esrc-postgraduate-funding-guide-dtc\\_tcm8-32257.pdf](http://www.esrc.ac.uk/_images/esrc-postgraduate-funding-guide-dtc_tcm8-32257.pdf)) for further guidance.

Requests for changes to the Training Grant should be submitted through the Grant Maintenance request functionality.

To access this, please log on to Je-S as normal.

1. Within the Functions section select '**Maintain Grants**'.
2. You will be taken to another screen which lists the Grants associated to you.

**Click on the radio button to select the Grant that requires amending.**

When selecting a request type from the drop down menu, please select the most appropriate option. If there isn't a suitable option, please use the 'Grant Generic Change Request'.

### Grant Request Types

Request Type	Valid Grant Status
Grant Deliverable Extension Request	Announced, Active, Suspended or Finished - <b>not required for Studentship DTGs</b>
Grant Deliverable Waiver Request	Announced, Active, Suspended or Finished - <b>not required for Studentship DTGs</b>
Grant Exceptional Slippage Request	Announced - <b>not required for Studentship DTGs</b>
Grant Extension Request	Active, Suspended or Finished
Grant Generic Change Request	Announced, Active, Suspended or Finished-
Grant Holder Change Request	Announced, Active, Suspended or Finished
Grant Suspension Request	Announced, Active, Suspended or Finished-
Grant Resumption Request	Suspended
Grant Termination	Active or Suspended
Grant Title Request	Announced, Active, Suspended or Finished
Grant Transfer Request	Active, Suspended or Finished
Update Organisation Reference	Announced, Active, Suspended or Finished

The Grant Maintenance Request alters information on the Grant NOT individual student records.

The ESRC requests that ROs submit their Grant Maintenance Requests between 1 October and 31 December of each year. You may need to submit multiple requests if you have amendments to students who are funded from different DTGs. All costs in the final year of the grant should be included in a Final Expenditure Statement rather than in a Grant Maintenance Request.

### **Where a funded extension outlasts the end date of the Grant**

Where an amended student's funding end date then outlasts the end date of the Grant, it is necessary to move that student on to a new Grant.

This can be done within the Student's record, under the **'Research Organisation'** heading.

Grants: click Add Grant

Please select the Category and the Training Grant that this studentship will be funded from. Enter in the start and end dates of the funding.

There may be instances where there is no new Grant to add this student to. In this instance please explain in the **'reason'** text box that you require the current DTG to be extended to cover the extension period. If this applies to multiple students, please ask for the extension to cover all the associated studentships.