Faculty of Humanities

Je-S Guide for PGR Student Records Management

November 2017

Version 9.02

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INTRODUCTION

This document is to support the following guides:

- AHRC Grant Funding Guide
- ESRC Postgraduate Funding Guides
- NWDTC Administrators guide
- ESRC NWSSDTP and CDT Admin Guide
- ESRC Je-S Guidance notes
- Je-S online handbook

Research organisations use the Joint Electronic Submission (Je-S) system to interact with the research councils (RCUK – soon to become UKRI). Je-S is an online interface for grant applications, post-docs, fellowships, consortia and studentships details submission and maintenance.

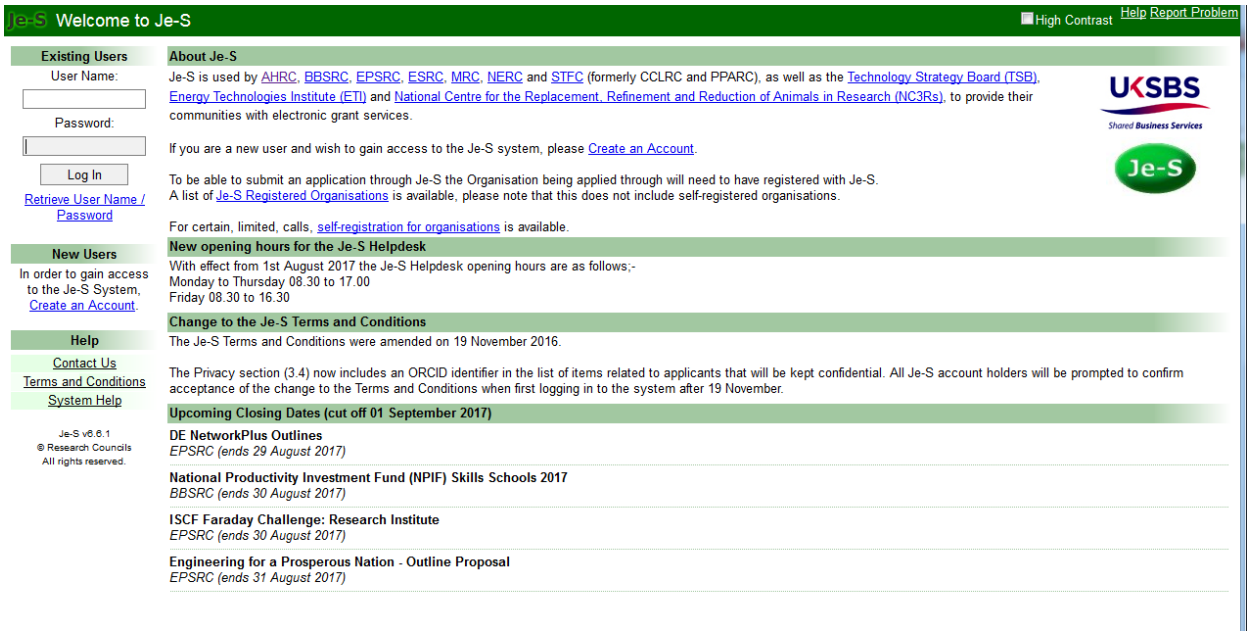
For postgraduate research students, accurate data reporting is crucial as research councils use data from Je-S to help carry out financial reconciliation exercise, calculate submission rates as well as extract information about research funded by RCUK in order to promote research impact and encourage knowledge transfer. It is therefore important to ensure that details of funded postgraduate research students are reported through Je-S in a timely manner and managed throughout the duration of their training.

Details on newly registering research council-funded students must be submitted via Je-S within a month of programme registration. Similarly, changes to individual student details should be updated within one month of the change occurring.

It is important that students and supervisors within your School are aware that changes in circumstances should be reported to you at the earliest opportunity so you can reflect them on Je-S. Failure to provide timely information on RCUK funded postgraduates can result in sanctions being imposed upon the University.

To request a new Je-S account, click on Create and Account, fill out your details and submit. Je-S support will then contact the University Research Operations Support office who will confirm your access.

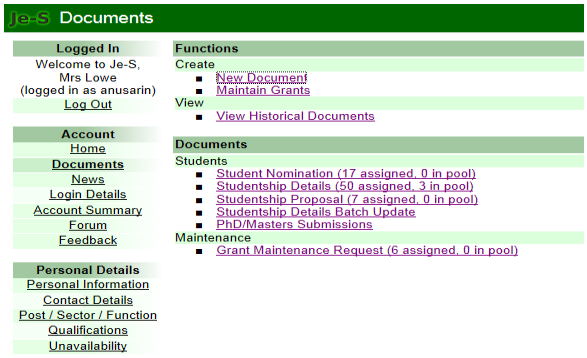
To log in: https://je-s.rcuk.ac.uk

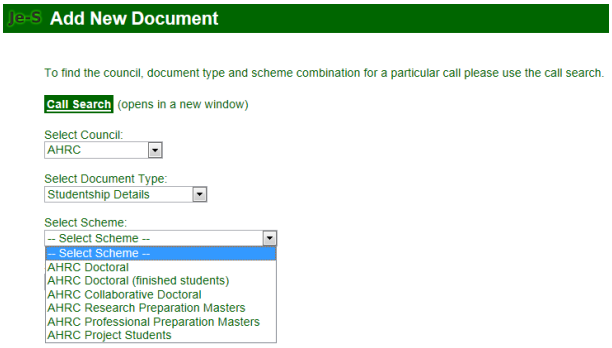


START OF ACADEMIC YEAR

NEW COHORT

The Faculty creates a Je-S record for each new research council-funded studentship at the start of the award using Create New Document function. Details are derived from candidate's application form and supporting documents (and CASE documents where applicable). The first year's funding detail (tuition fee and stipend) will be populated at the same time.

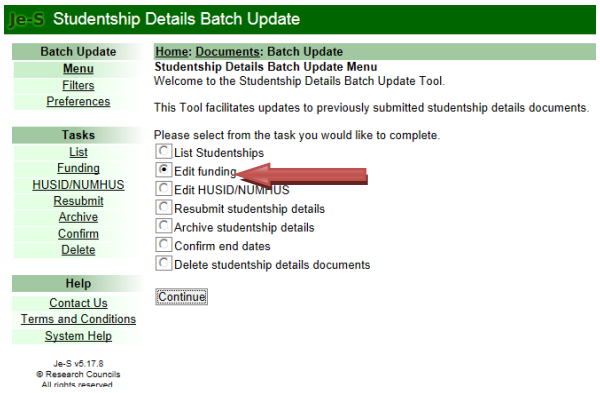


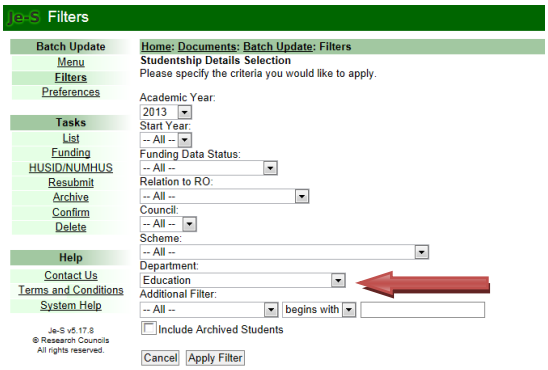


EXISTING COHORTS - FUNDING DETAILS

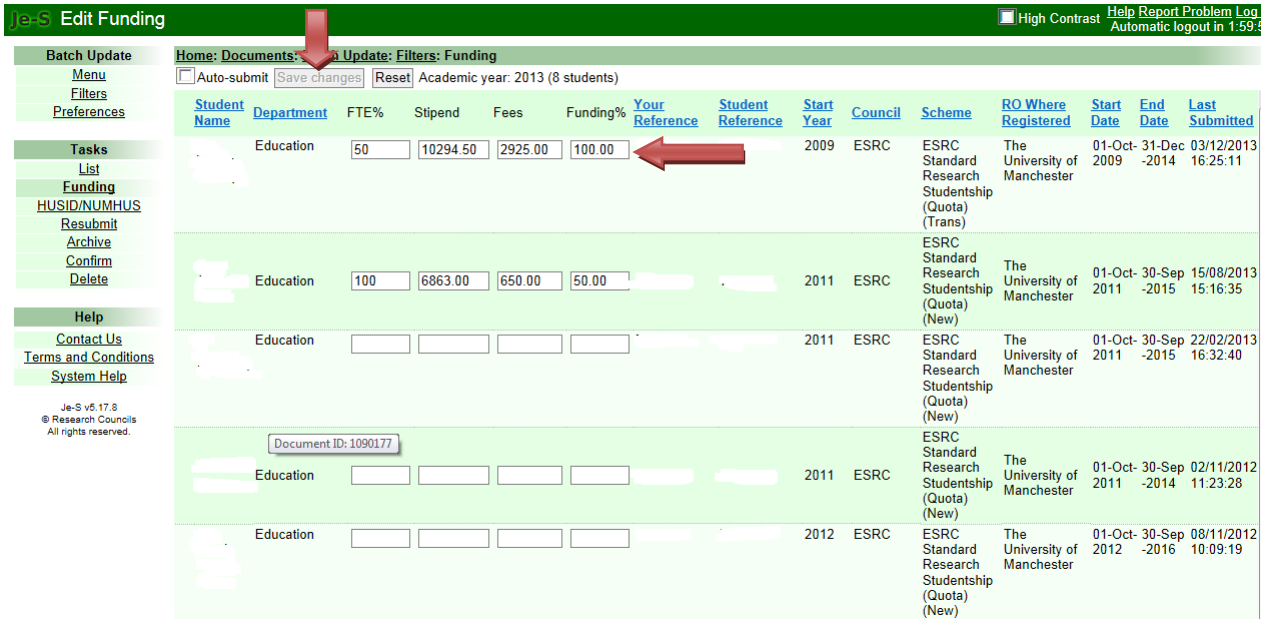
At the beginning of each academic year, Schools must enter details of funding (tuition fee and stipend) for the new academic year to the Je-S record for all continuing studentships. This can be done by either using **Edit Funding** tool to batch update a group of records or by updating each record individually.

To batch update using Edit Funding, go to Documents and choose **Studentship Details Batch Update**. Choose **Edit funding**, select relevant filters and click **Apply Filter** button.





You need to fill in the FTE%, Stipend, Fees and Funding% fields. Funding% refers to the percentage of funding provided by the research council. Once updated, click on the Save changes button.



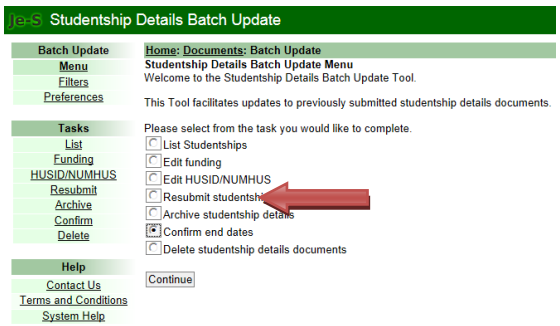
Completed students - Confirm End Date

We use the **Confirm end dates** tool to update the students' completion/continuation status regularly to keep the Je-S records up-to-date.

Additionally, under RCUK's Gateway to Research initiative, all RCUK-funded projects are made available to the public. Therefore, we are obligated to keep studentship research titles and summaries up-to-date. When a student completes, we need to update the final project title and summary on Je-S using data provided separately by the student or using the eThesis metadata.

1. To update project title and project summary, go to individual Je-S document's **Project Details** screen, input data and click Save. Data input here must be checked for sensitive and/or confidential information. See http://www.itservices.manchester.ac.uk/cybersecurity/data-handling/ for guideline about sensitive data.

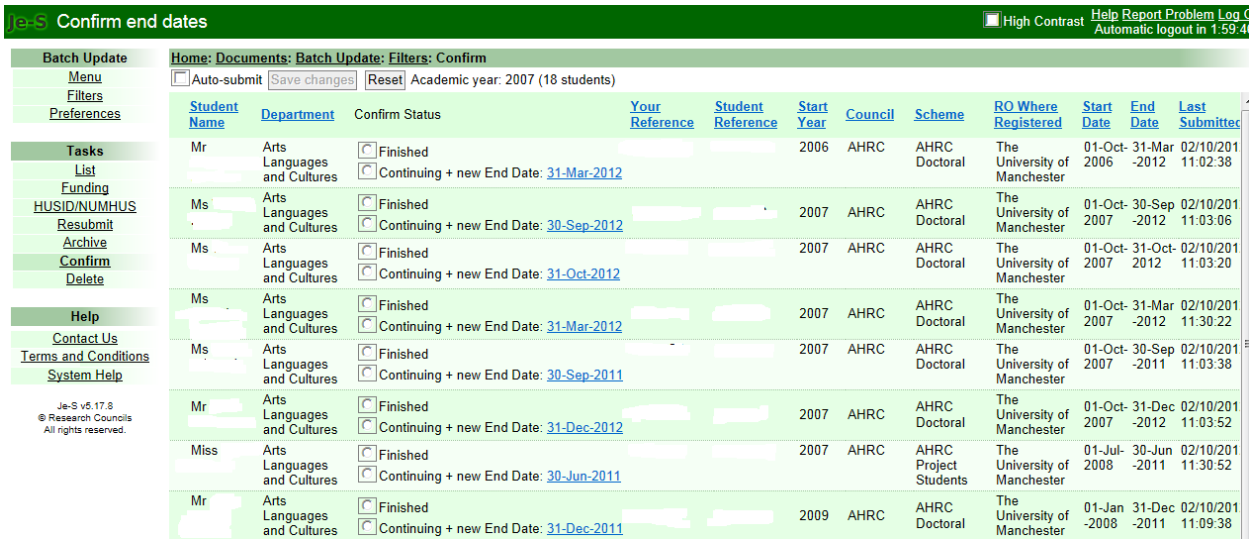
2. To confirm end date, go to Documents and choose **Studentship Details Batch** Update. Choose **Confirm end date**, select relevant filters and click **Apply Filter** button. The records presented are those active in the chosen Academic Year.



You can sort the records in ascending or descending order by clicking on any of the column headers. Student Name is sorted by surname.

Students who have completed the degree should be confirmed as **Finished** or leave the Confirm Status blank if they have not completed. The **End Date** on this screen refers to the Funding End Date in the Researcher Training Dates screen.

Once updated, click Save changes button.



Note:

- **Where there are interruptions/extensions, please record these in the individual studentship records (see Interruptions/Extensions section).**
- **For students who have withdrawn or been discontinued, please record this in the individual studentship records (see Termination section)**

UPDATING STUDENTSHIP DETAILS

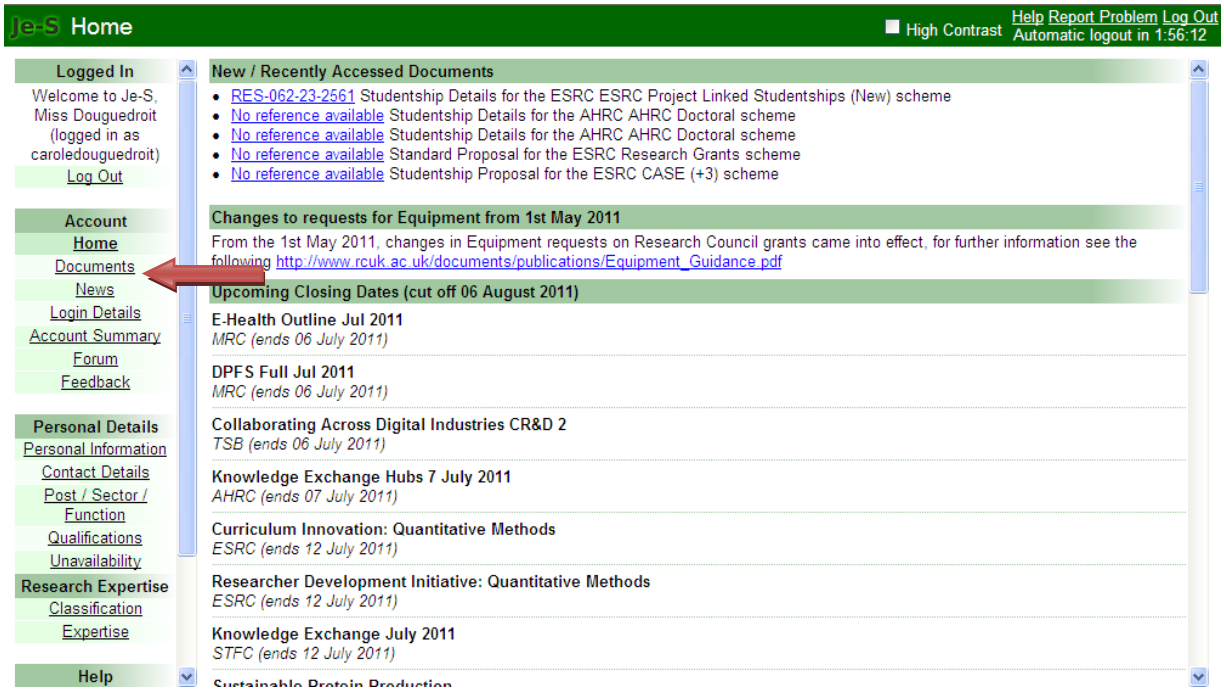
Please make sure to regularly update research council-funded student details to reflect any changes to the project or student details. Essentially, should any of the information originally submitted change during the course of their programme, Je-S must be updated.

The most typical changes relate to student interruptions, extensions, mode of attendance, project title or supervisor changes. Such changes should be submitted on Je-S as soon as they are approved and become effective. Please liaise with Niqui Ellis (ESRC) and Carole Douguedroit (AHRC) for any queries.

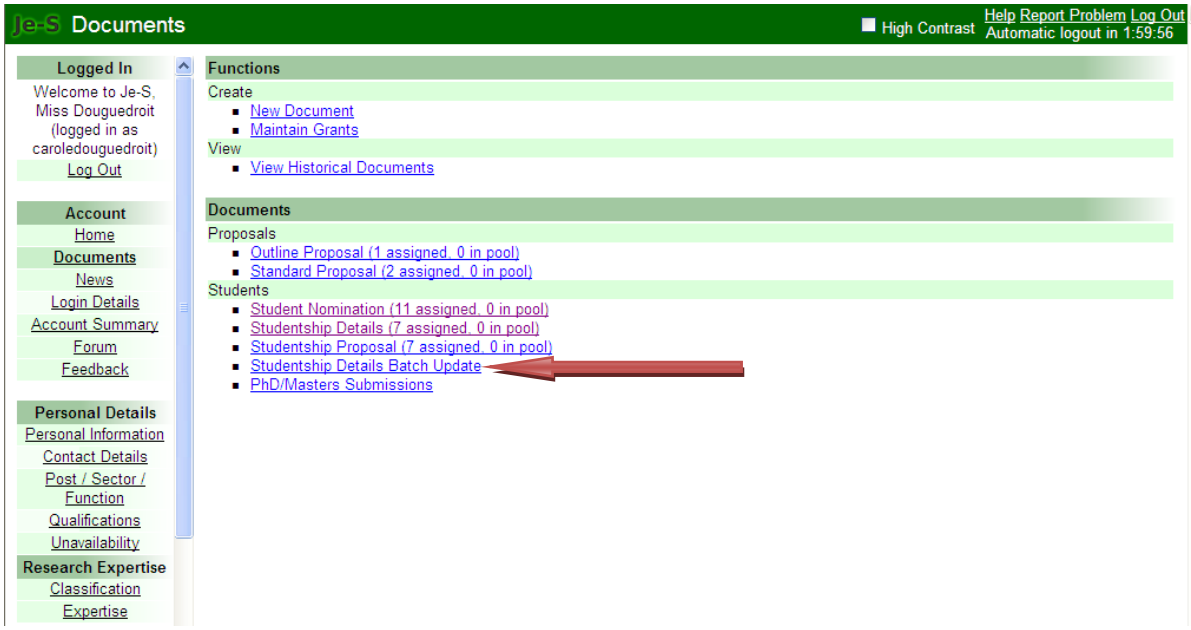
Summary of changes:

Changes which affects funding element	Changes which do not affect funding element
Interruption	Supervisor
Extension	Project title
Internship, OIV, DLT, fieldwork	Classification (subject area)
Termination, withdrawal, early submission	Transfer between departments
Mode of attendance, downgrade	Transfer between institutions

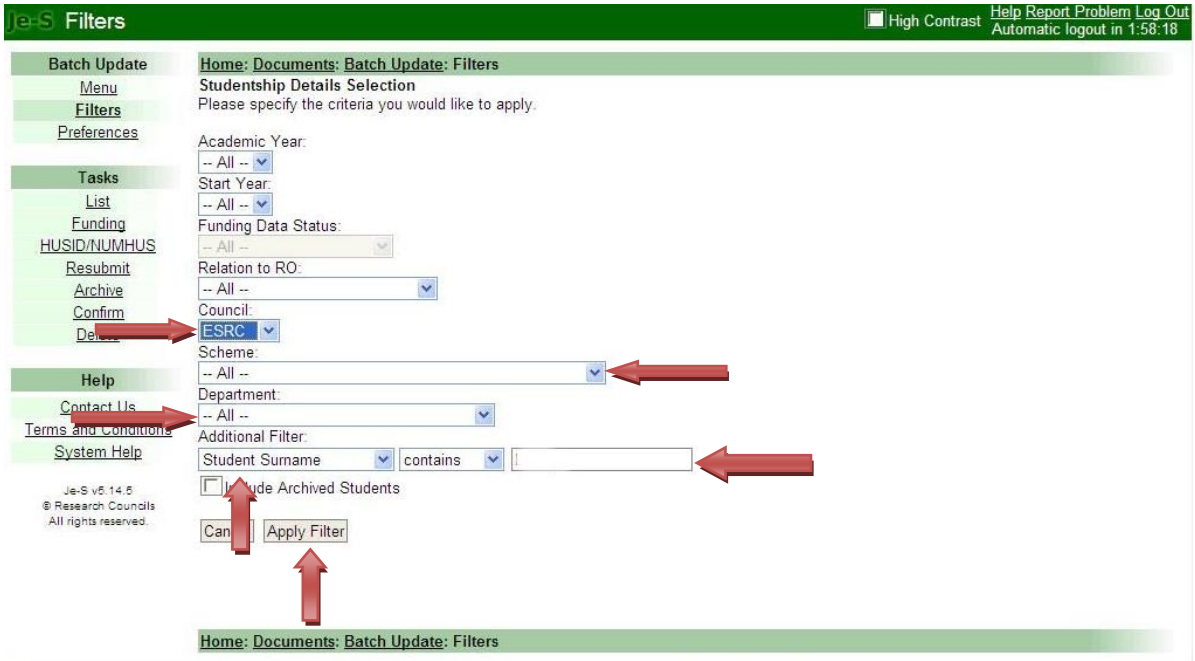
To access a studentship document, select the **Documents** link from the Je-S homepage.



Click on **Studentship Details Batch** Update.

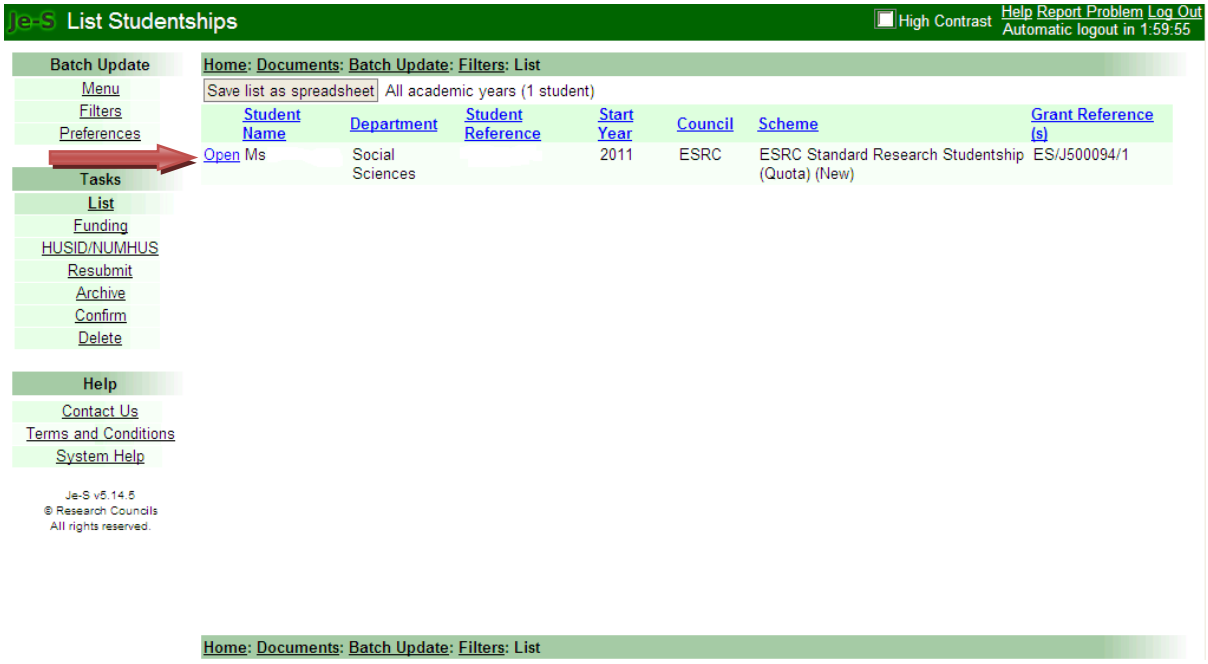


Choose filters to search for the student record (s) you wish to update.



Click **Apply Filter**.

If you do not have access to relevant records please contact researchoperations@manchester.ac.uk at the Research Office.

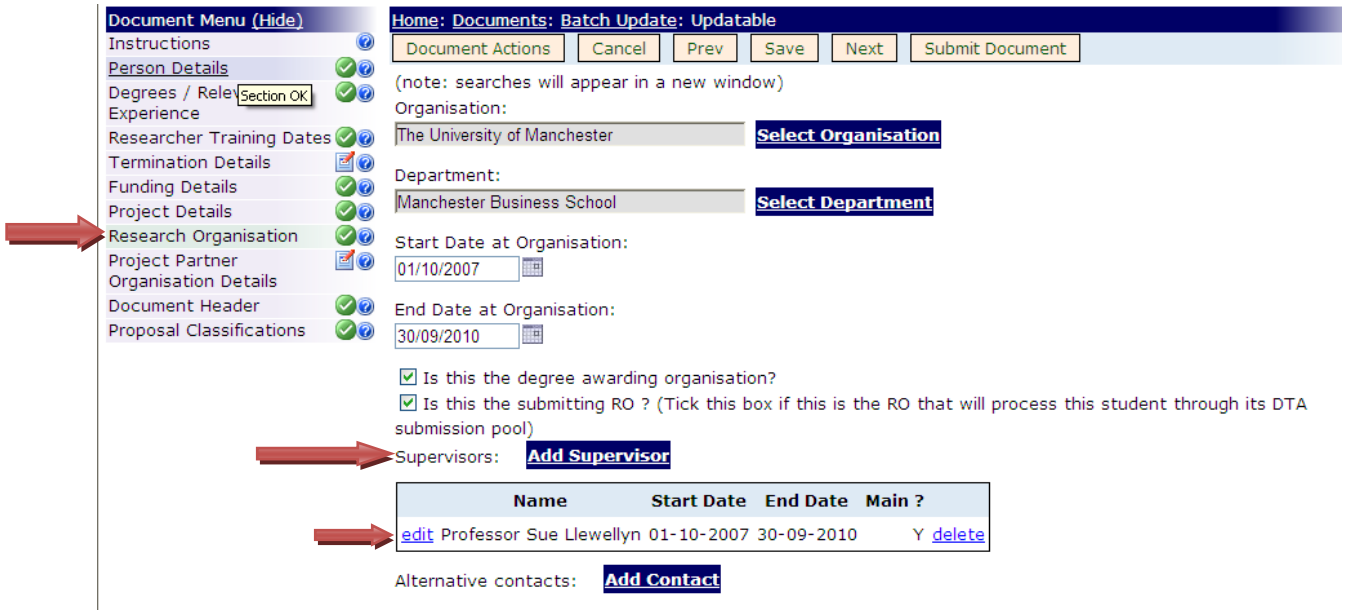


Once you have found the student record, click Open. This will take you to the student record screen for this student. You will find the menu on the left hand side of the screen.

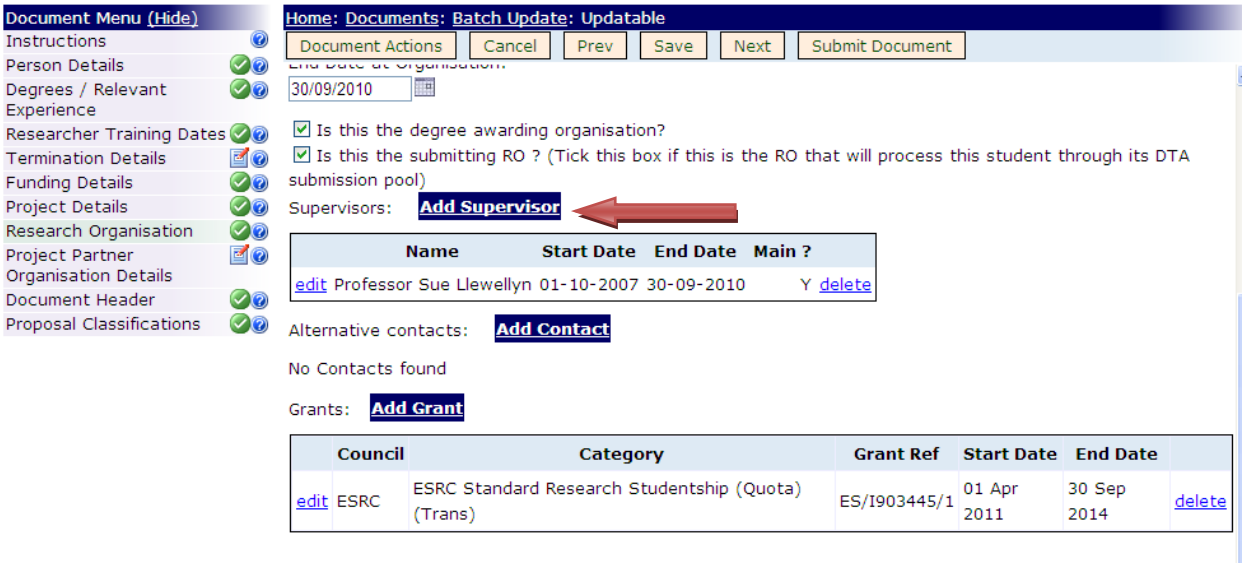
After any changes you make – remember to save the transaction and click **Submit Document** which will automatically trigger document validation. If any crucial fields are missing, they will be displayed during validation.

CHANGE OF SUPERVISOR

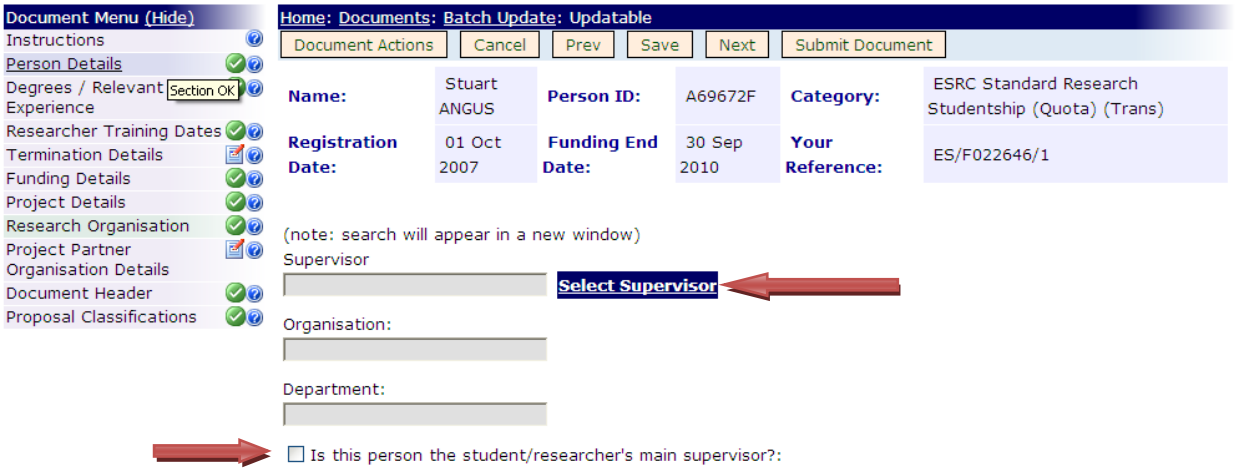
Changes to a supervisory team can be made on **Research Organisation** screen.



If there is a change in main supervisor, make sure the original main supervisor box is unticked and the tick is applied to the new main supervisor.



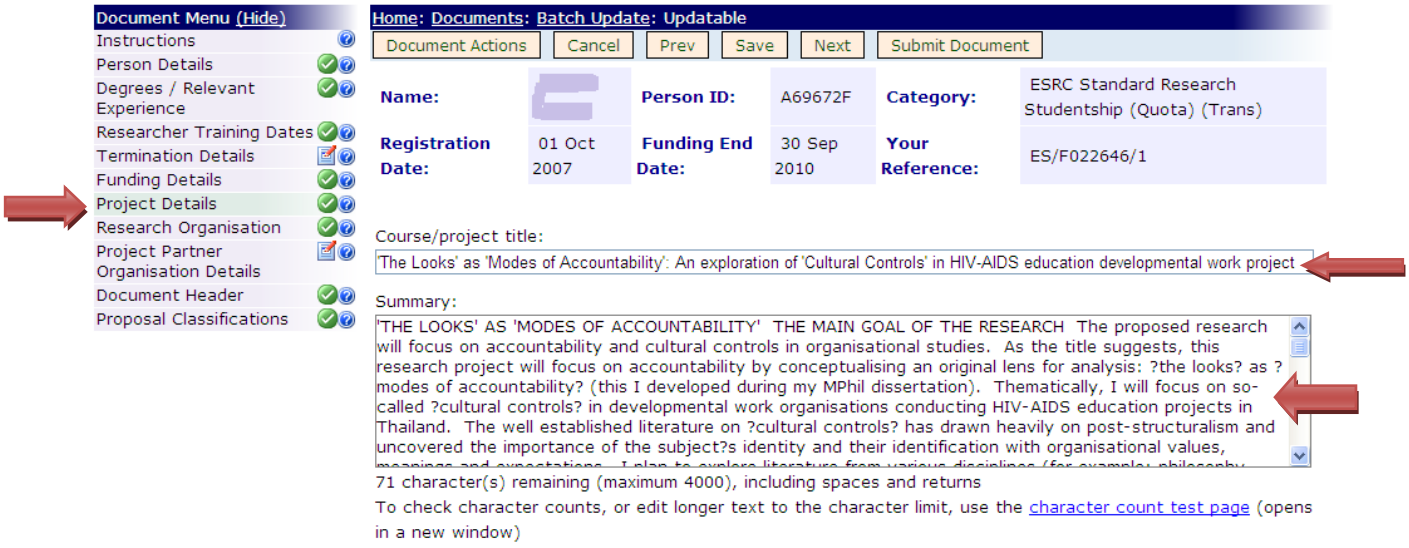
Then add a new supervisor.



Select the new supervisor by searching in Je-S database or by adding a new person to the system. Once completed, click Save and Submit Document.

Change of Project Title

Select **Project Details** from the menu and amend the title/abstract as appropriate. Once completed, click Save and Submit Document.



If the project moves into a different research area, the Research Area field also needs updating in the Classification/Proposal Classifications screen.

Change of Mode of Study (part-time/ full-time)

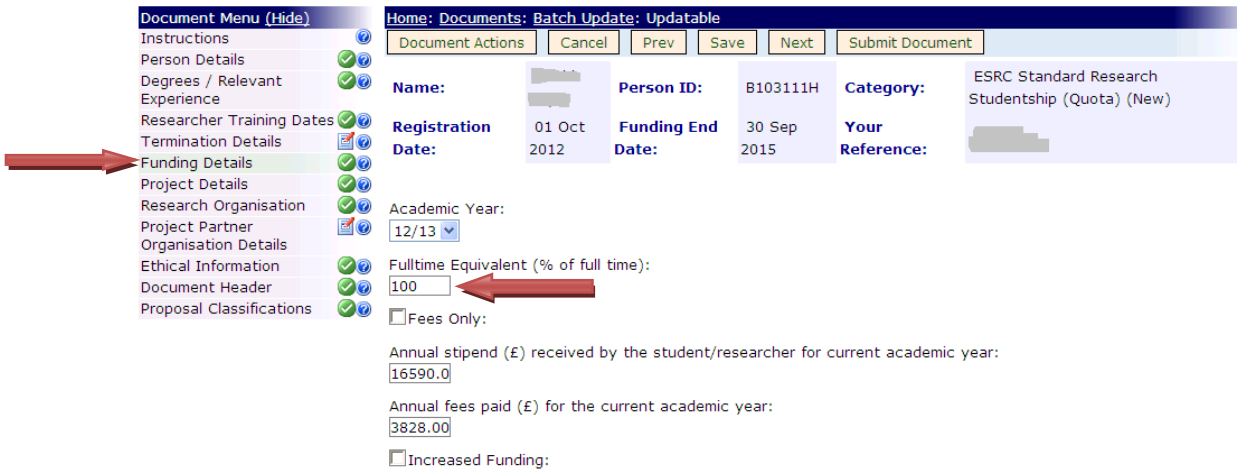
A student can change mode of study subject to the funding body's approval. Please liaise with the Faculty to check eligibility.

Note:

- **For ESRC students, any change to part-time in the final year of full-time PhD must be approved by the DTC/DTP first**
- **Change to the mode of attendance in the final six months of a studentship or during submission pending year is not allowed.**
- **Please also refer to research council specific stipulation on the Expected Submission Date on the Je-S online handbook**

You need to update:

1. **Funding End Date** (Researcher Training screen)
2. **Expected Submission Date** (Researcher Training screen)
3. **Course End Date** (for masters if applicable) (Researcher Training screen)
4. **PhD End Date** (Researcher Training screen)
5. **Reason for change**: Status change (Researcher Training screen)
6. **% of full-time**, **Annual stipend**, **Annual fees** (Funding Details screen)
7. **End Date at Organisation** and **End Date of Funding from Grant** (Research Organisation screen)



Save and submit.

INTERRUPTIONS

Interruptions and extensions are recorded on Je-S by amending the **Research Training Dates** section to reflect the new date for student's funding (where applicable) and expected submission deadline and inserting the reason on the drop down menu.

Please remember to check the relevant research council funding guide and the Faculty Special Permissions Guidelines to ensure the change has been through the appropriate approval channels before updating Je-S.

MATERNITY/SHARED PARENTAL LEAVE/SICK LEAVE

1. In the **Researcher Training Dates** section, select **Edit** at the bottom of the page and update **Funding End Date**, **PhD End Date** and **Expected Submission Date**, adding the commensurate time to the end of the studentship. Choose **Reason for change** from the drop down menu and Save.
2. In the **Funding Details** section, record the correct amount of funding that the student is entitled to and Save
3. In the **Research Organisation** section, update the **End Date at Organisation** and **End Date of Funding from Grant** and Save. For NWDTC and NWSSDTP students, **End Date of Funding from Grant** will be under Liverpool section.
4. Save and submit the document.

Note:

- **Students are not entitled to any additional funding (RTSG, overseas fieldwork, OIV, DLT) during the leave period**
- **Where supported by medical evidence, RUCK-funded students are entitled to up to 13 weeks paid sick leave in a given academic year. This excludes SPP year.**
- **If the student receives additional or match funding from other sources other than through DTP match-funding mechanism, please check with the other funding bodies for their entitlement/eligibility. Top-up awards are usually not provided during maternity/shared parental leave/sick leave.**
- **Where schools require assistance calculating the award amount, please contact the Faculty**

UNPAID INTERRUPTIONS

Where a student has been granted permission to take an unpaid interruption (eg to take fellowship opportunities, sick leave beyond 13 weeks paid sick leave entitlement, interruption due to other personal circumstances), please record the interruption as above. Particular attention should be paid to the **Funding Details** section where the amount of funding in the academic year affected may need amending to reflect the entitlement.

EXTENSIONS

EXTENSION TO PROGRAMME END DATE

Where an extension has been granted, the Je-S record needs to be updated in the following sections:

1. **Funding End Date** (Researcher Training screen)
2. **Expected Submission Date** (Researcher Training screen)
3. **Course End Date** (if applicable) (Researcher Training screen)
4. **PhD End Date** (Researcher Training screen)
5. **Reason for change** (Researcher Training screen)
6. **Annual stipend** and **Annual fees** (Funding Details screen) depending on whether this is a funded extension
7. **End Date at Organisation** and **End Date of Funding from Grant** (Research Organisation screen)

EXTENSION TO THESIS SUBMISSION DEADLINE

When an extension has been granted, the Je-S record needs to be updated in the following sections:

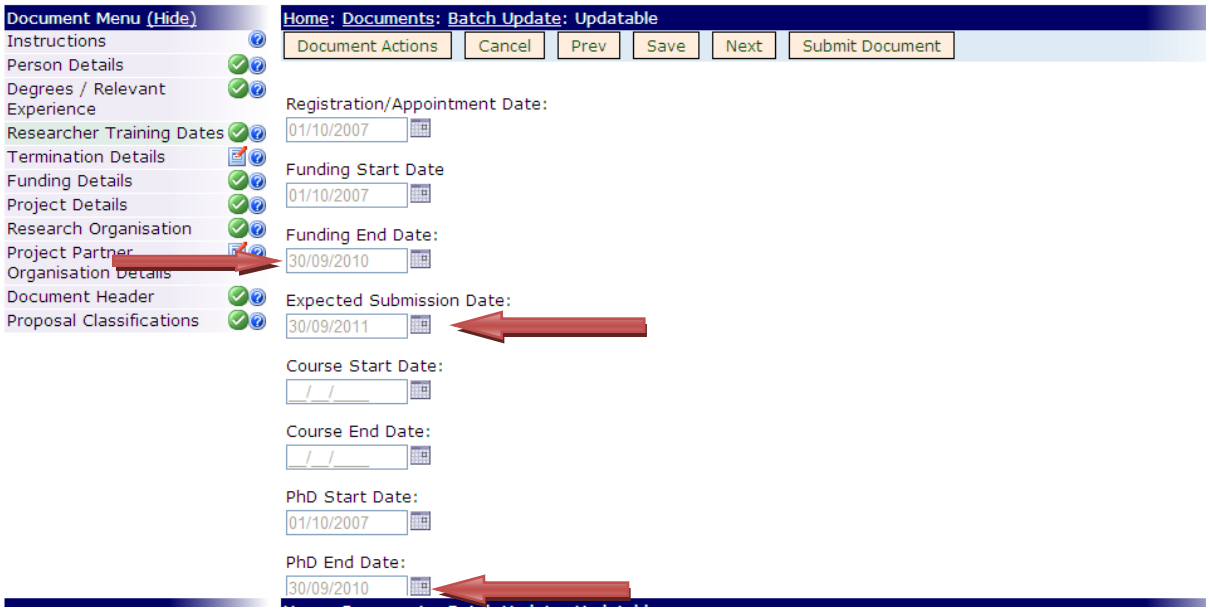
1. **Expected Submission Date** and **Reason for change** (Researcher Training screen)
2. **End Date at Organisation** (Research Organisation screen)

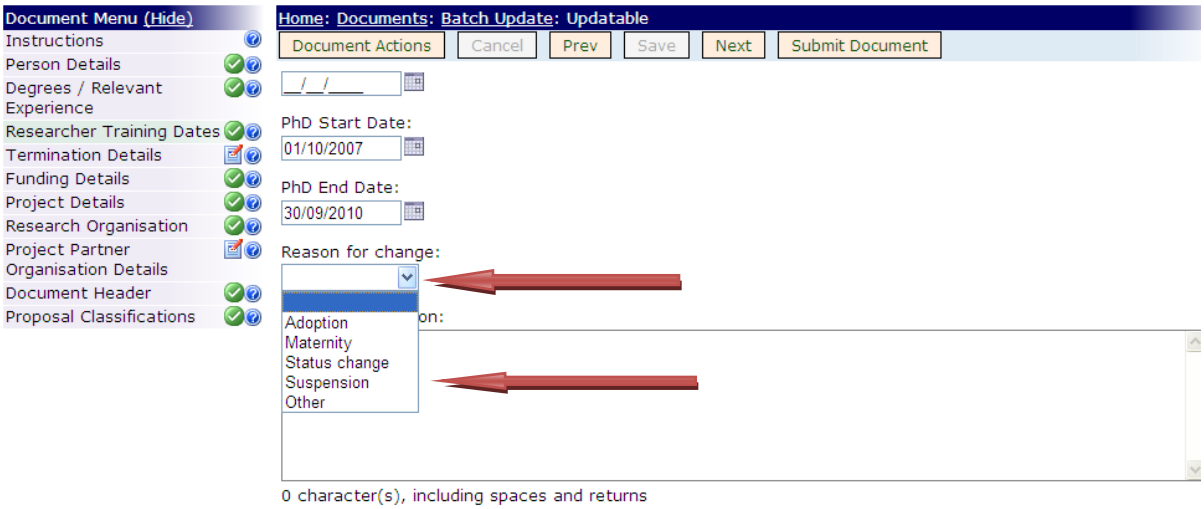
Note:

- **AHRC students who have been granted extensions to programme for DLT/internship/placement/OIV must normally submit the thesis by the original deadline. In this case, only the PhD End Date and Funding End Date should be amended. The Expected Submission Date remains unchanged.**
- **ESRC students who have been granted extensions to programme for DLT/internship/placement/OIV are currently allowed corresponding extension to their Expected Submission Date. Therefore, the Expected Submission Date must also be amended.**

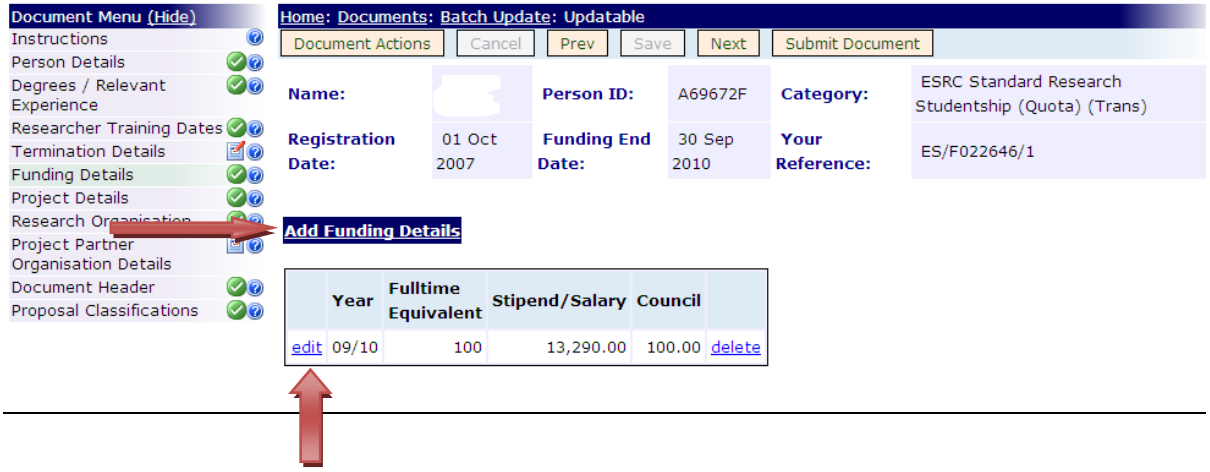
Researcher Training Dates screen

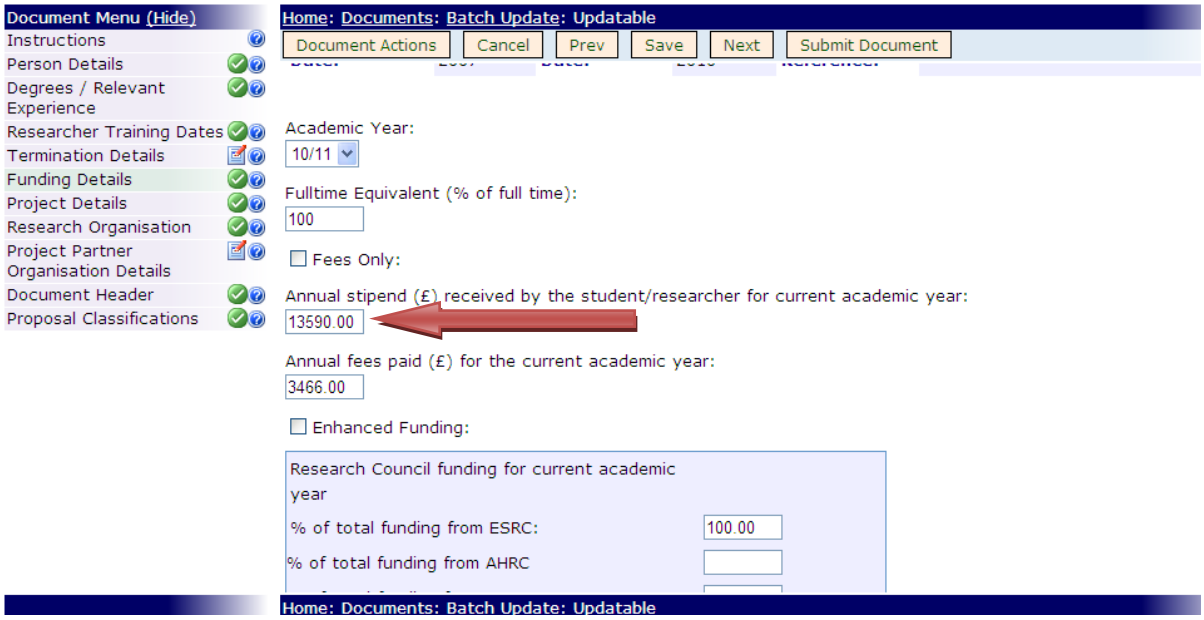
Change the **Funding End Date** and **Expected Submission Date**, select **Reason for change** and record additional information in the free text box.





Funding Details screen



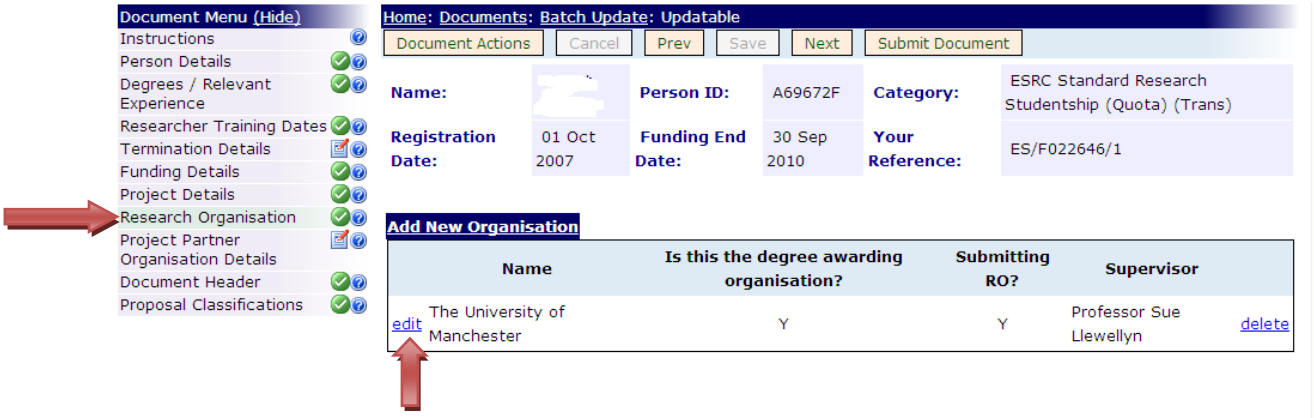


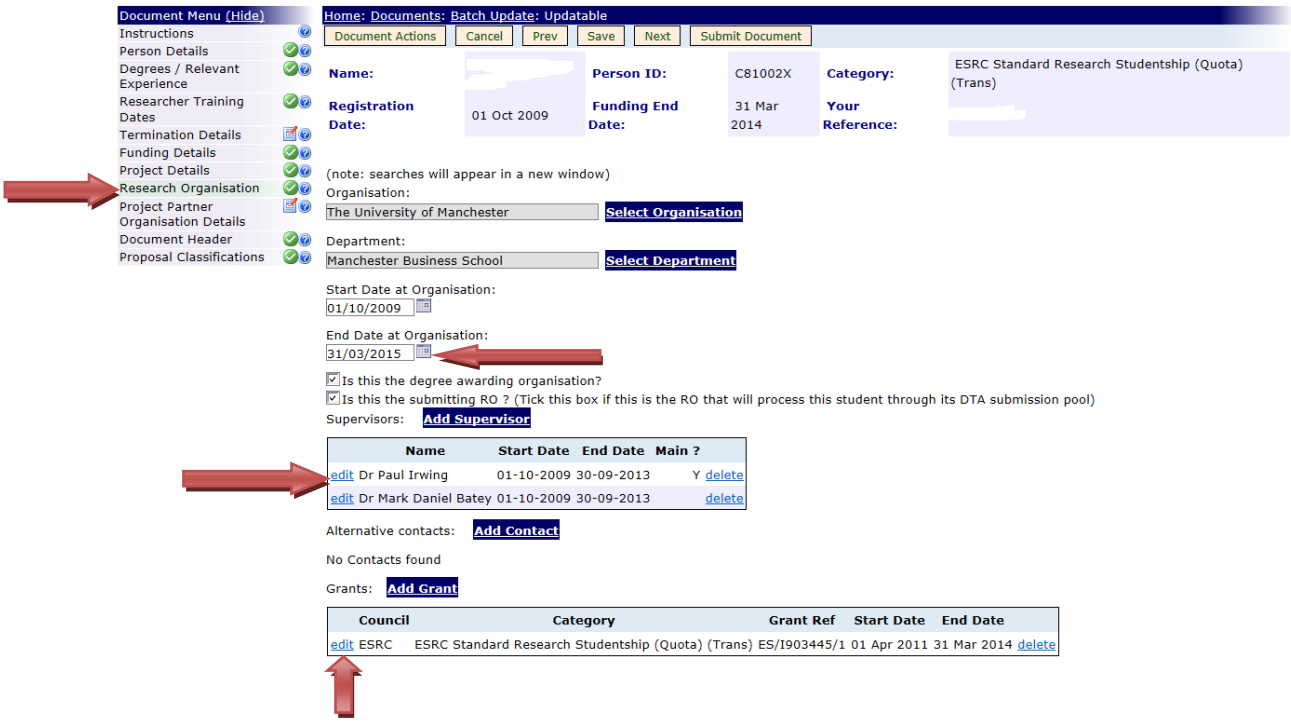
You will need to amend the level of stipend as appropriate and adjust the tuition fees applicable in that particular year. The **Annual stipend** amount should be the total funding that the student receives, regardless of the funding split where match-funded.

Research Organisation Screen

Click on **Edit** and change the **End Date at Organisation** to reflect the interruption/extension. **End Date at Organisation** is normally the same as **Expected Submission Date** except when a student submits early.

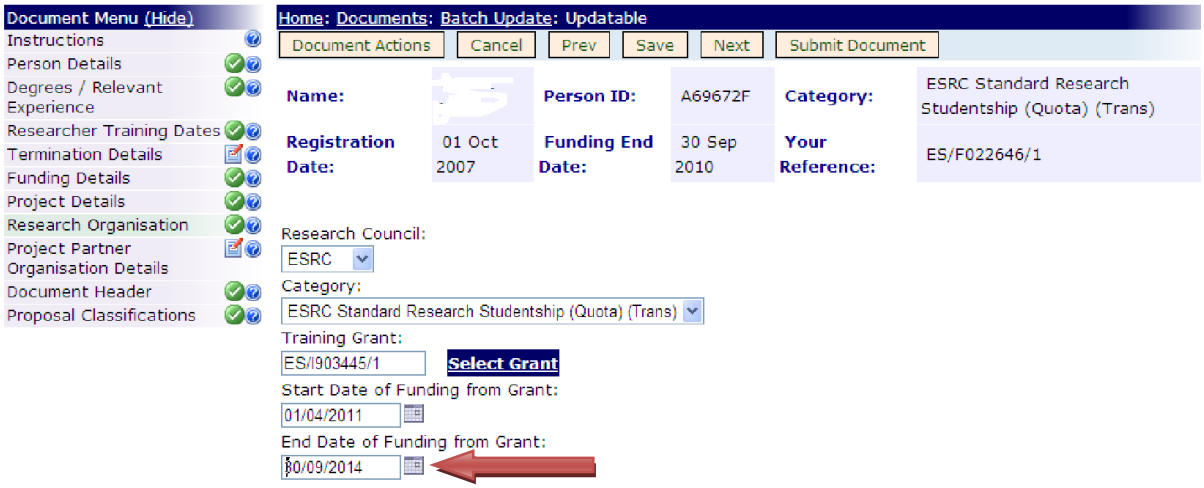
For NWDTC and NWSSDTP students, you need to change the **End Date at Organisation** in both Manchester and Liverpool sections. For CEELBAS students, the UCL section also needs updating.





Then scroll down until you can see the details of the Grant to which the student is attached. Change the end date on the grant by clicking on edit and change the **End Date of Funding from Grant** to reflect the change. The **End Date of Funding from Grant** is normally the same as Funding End Date in the Researcher Training Dates screen.

For NWDTC and NWSSDTP students, the grant is recorded in the Liverpool section. For CEELBAS students, the grant is recorded in the UCL section.



Don't forget to save the change by clicking save on the top and then submit the document.

DIFFICULT LANGUAGE TRAINING/FIELDWORK

DIFFICULT LANGUAGE TRAINING (DLT)/OVERSEAS INSTITUTIONAL VISITS (OIV)/INTERNSHIPS/PLACEMENTS

There are different arrangements for AHRC and ESRC-funded studentships. Below is a summary:

	AHRC NWC	ESRC
Approval by	TBC	NWDTC/NWSSDTP
Je-S update	TBC	Record change of dates and funding

For ESRC, DLT, OIV, Internship and Overseas fieldwork funding must first be approved by the NWDTC/NWSSDTP as appropriate. If approved, the Faculty will liaise with schools regarding payments and CS and Je-S record amendments.

NWDTC/NWSSDTP-approved DLT/OIVs/Internships attract additional funding and an extension to the studentship, the programme and thesis submission deadline. Please amend the dates in the **Researcher Training Dates** screen and record the additional funding in the **Funding Details** as follow.

1. **Funding End Date** (Researcher Training screen)
2. **Expected Submission Date** (Researcher Training screen)
3. **Course End Date** (for masters if applicable) (Researcher Training screen)
4. **PhD End Date** (Researcher Training screen)
5. **Reason for change**: Other (Researcher Training screen). Record in the free text section that this is for Difficult Language Training
6. **End Date at Organisation** and **End Date of Funding from Grant** (Research Organisation screen)
7. **Annual stipend** (Funding Details screen)

For AHRC, consideration and approval are made by the NWCDTP. Once approved, schools need to amend the above Dates fields (1-6).

OVERSEAS FIELDWORK FUNDING

For NWDTC/NWSSDTP-approved overseas fieldwork funding, please update the **Annual stipend** (Funding Details screen) for the academic year only. If this spans over two academic years, record it so on Je-S.

No extra time is added. All the Dates on Je-S remain the same.

Example: Student receives £3,000 for a NWDTC- approved fieldwork in Mexico from 1 August 2012 to 31 October 2012

2011/12 maintenance = Normal maintenance of £ 13,590 + £1,000

2012/13 maintenance = Normal maintenance of £13,590 + £2,000

For AHRC student, funded fieldwork doesn't need to be recorded on Je-S as it will be reconciled separately through the University Finance.

Note:

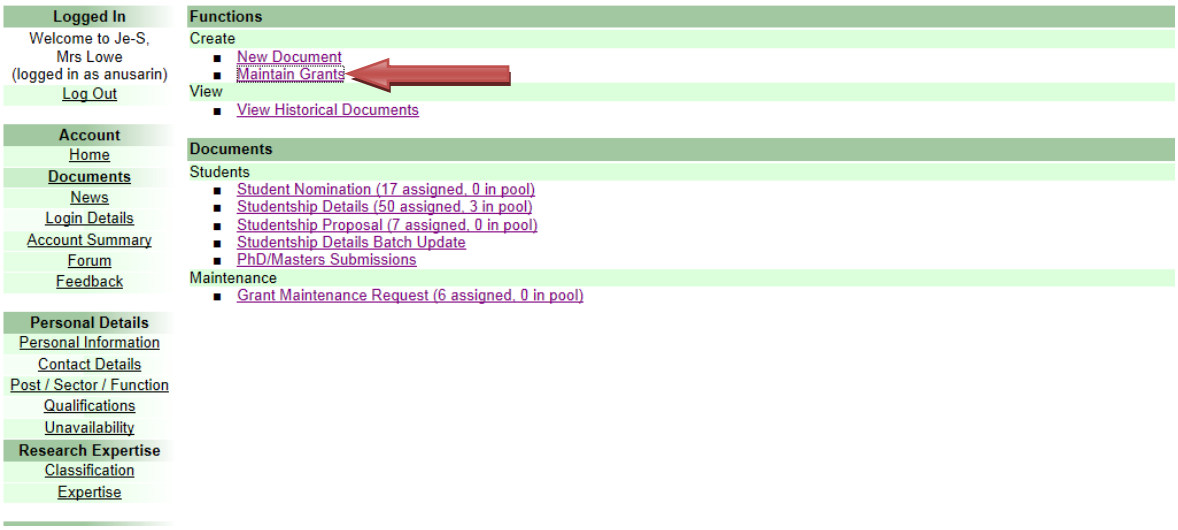
- **The student will not be on an interruption during their DLT/OIV/Internship/Placement. They are paid the stipend as normal during their time away. A paid extension is added to the original funding end date of the award for the time period on the OIV/internship.**
- **Fees only students will receive an extension to their fees (needs to be recorded on Je-S) and RTSG.**
- **Expenses incurred on the internship should be claimed to the ESRC directly (up to £1000 per month for accommodation and travel).**

AHRC International Placement and other internship schemes

If you have research council-funded students wishing to go on an AHRC IP or an internship under other schemes, please liaise with the Faculty.

GRANT END DATE

If the student's End Date of Funding from Grant changes following an interruption/maternity leave/internship/DLT, change to part-time and exceeds the official end date of the grant their studentship is attached to, you will get an error message at document validation stage. If this happens, arrangements need to be made to amend the grant end date through Grant Maintenance Request in the Maintain Grants function.



For pre-DTC students, we need are required to liaise with ESRC. For NWDTC or NWSSDTP students, Liverpool will coordinate with ESRC. Please liaise with Niqui Ellis in either case.

After the grant has been extended, you can then revalidate and resubmit the Je-S studentship document that you have amended.

Note: If the grant end date doesn't get amended properly, the University will not be able to claim from this grant beyond the official end date even though the studentships attached to it are still live. The remaining cost of the studentship must then be borne by the School.

TRANSFER OF AWARD

For students transferring between institutions, if approved by the School PGR Committee in line with the University policy, an arrangement has to be made for the finance of the award which may be by grant transfer or by us invoicing the originating institution or vice versa. Where a grant needs to be transferred, please liaise with the Faculty.

RECEIVING A STUDENT

The School needs to request for the Je-S studentship document to be transferred to the University of Manchester. The originating institution has to edit the studentship document. In the **Research Organisation** section:

1. Change the **End Date at Organisation** and untick degree awarding organisation and submitting RO boxes in the original research organisation section
2. **Add New Organisation**, select University of Manchester from organisation search, select **Department**, add **Start Date at Organisation**, **End Date at Organisation**, **Supervisor** and tick degree awarding organisation and submitting RO boxes

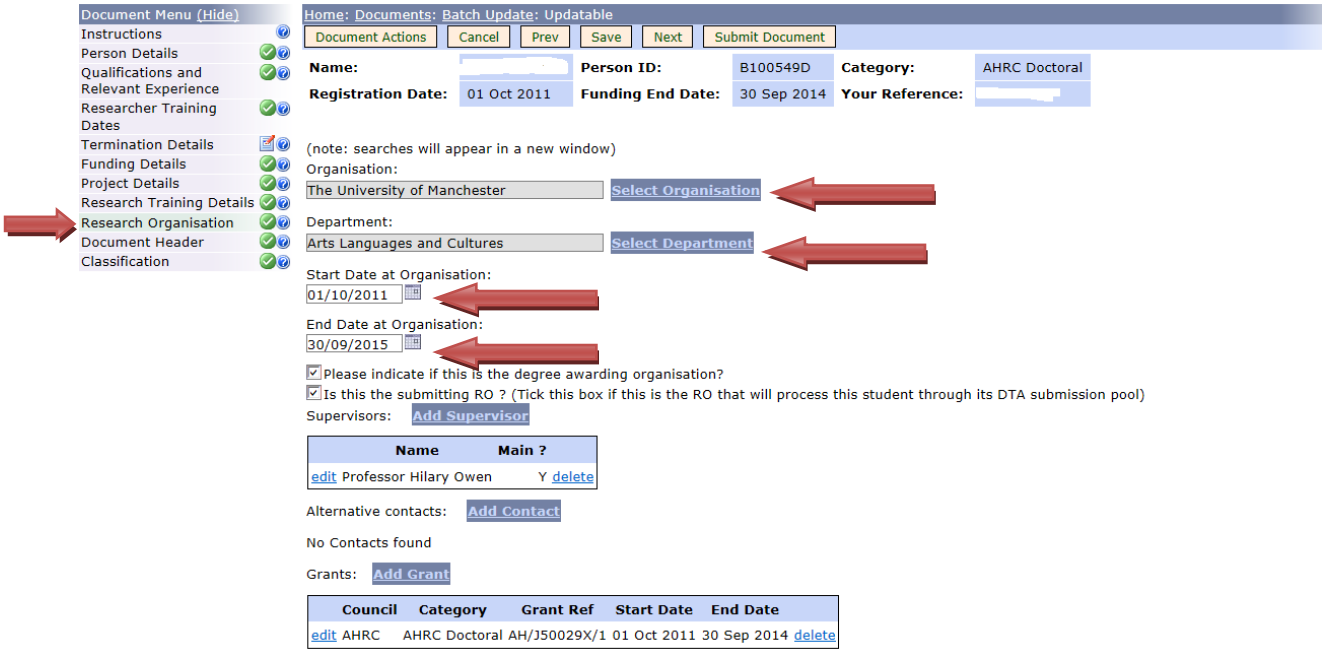
Save and submit. We will then be able to view and edit this Je-S document.

RELEASING A STUDENT

To transfer the Je-S studentship document from Manchester to another institution, we need to update the **Research Organisation** section:

1. Change the **End Date at Organisation** and untick degree awarding organisation and submitting RO boxes in the Manchester section
2. **Add New Organisation** by choosing the receiving institution from the search, select **Department**, **Start Date at Organisation**, **End Date at Organisation**, **Supervisor** (if known) and tick degree awarding organisation and submitting RO boxes

Save and submit. The receiving institution will then be able to view and edit this Je-S document.

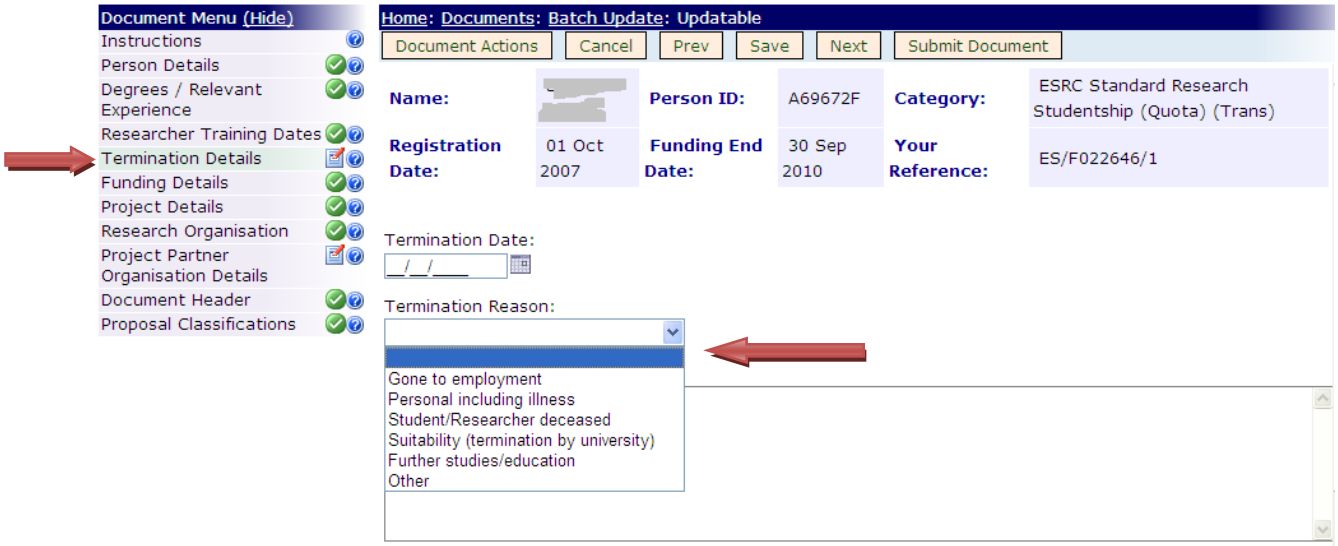


TERMINATION OF STUDY/EARLY SUBMISSION

TERMINATION

Should a student withdraw or is terminated by the University, you need to update:

1. **Termination Date**, **Termination Reason** and any further information in the free text box (Termination Details screen)



2. **Funding End Date** and **Course/PhD End Date** (Researcher Training Dates screen)
3. **Annual stipend** and **Annual fee** reflecting the stipend that has been paid to the student so far and the pro rata tuition fee in that academic year (Funding details screen)
4. **End Date at Organisation** and **End Date of Funding from Grant** (Research Organisation)

Make sure to save the changes on each screen and then submit the document.

Note: If a student withdraws or is terminated after the Funding End Date ie during the Submission Pending Period, please use the **Funding End Date** as the **Termination Date** in Termination Details screen.

EARLY SUBMISSION

1. Update **Project Details** as per the guideline in the **Confirm End Date** section above
2. Update items 2-4 above

Note:

- **For AHRC, if a student submits the thesis early ie before the end of their studentship period, the studentship must be terminated from the end of the quarter in which they submit the thesis (refer to AHRC Guide).**
- **For ESRC and EPSRC, the thesis submission date becomes the funding end date unless they have ESRC's approval for continuation of funding.**

Once you are happy with your updates, you need to validate and submit the document. You should only need to go through the validation and submission process once. The document will be submitted to the council directly and will not go through an approver pool. Once the document has been submitted to the council you will receive and automated email confirming the submission.

RCUK SUBMISSION RATE SURVEYS

RCUK runs annual submission rate survey which takes place around the end of October – beginning of December. Each survey includes studentships with expected thesis submission date on Je-S between 1 October and 30 September. The survey must be completed online via Je-S. Schools are required to input the actual date of the student's thesis submission using the **PhD/Masters Submissions** screen:

Schools will receive advanced notification in order to ensure records accuracy before the survey opens and will receive another notification with instruction on the survey completion and deadline.

ESRC stipulates that:

The current sanctions policy requires institutions to achieve an overall four-year submission rate of 60%. Institutions that return a lower rate are ineligible to receive new ESRC research studentships for up to two years.

AHRC submission rate statistics can be found http://www.ahrc.ac.uk/about/statistics/competitionstatistics/

RESEARCHFISH

The RCUK requires all RCUK-funded students to submit information about their research output online via Reseachfish: www.researchfish.net. This exercise aims to capture the impact of research funding and is conducted annually around February – March each year. Students and recent graduates included in each data collection round will be sent communication from Researchfish by email. It is therefore crucial that their email address held on the Je-S record is correct and up-to-date.

FURTHER INFORMATION

University AHRC contact – Carole Douguedroit (carole.douguedroit@manchester.ac.uk) 61114

University ESRC contact – Nichola Ellis (nichola.ellis@manchester.ac.uk) 50284

Faculty PGR administrator – Anusarin Lowe (anusarin.lowe@manchester.ac.uk) 53275

Faculty Finance Officer – Catherine Harrop (catherine.harrop@manchester.ac.uk) 57854

University EPSRC Finance Officer – Stephen Chipp (wayne.ferris@manchester.ac.uk) 65790

Je-S helpdesk: (JeSHelp@rcuk.ac.uk) 01793 44 4164

Je-S access rights: researchoperations@manchester.ac.uk