How to create a studentship record

CHECK STUDENTSHIP DOESN'T ALREADY EXIST

1. From the Dashboard search for the record within 'Find Studentship Record' or 'View Incomplete Studentship Records'

2. If the record is listed in the 'View Incomplete Studentships' select 'Continue' against the relevant one and continue editing as required:

3. If the record already exists, select the relevant hyperlink and continue editing as required.

CREATE NEW STUDENTSHIP RECORD

4.   If the record does not exist, from the Dashboard select 'Create New Studentship Record'
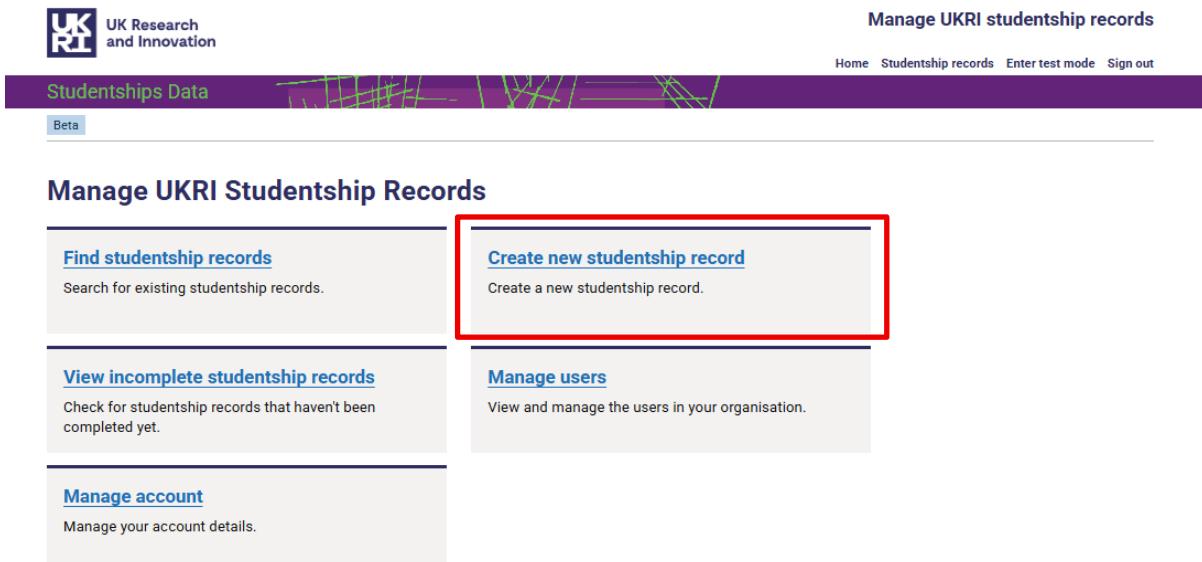
5.   Complete the Studentship Record in succession starting with the Student Personal Details. Each section will need to be completed in order.

Create studentship

Home   Studentship records   Enter test mode   Sign out

Studentships Data

Beta

Create Studentship

Your reference number SDD-000000415

Form incomplete

You have completed 0 of 6 sections.

Student personal details	Not yet started
Basic information about their name, research organisation, email address and equality, diversity and inclusion (EDI) profile.	
Studentship details	Cannot start yet
This includes information about their funding dates and project details.	
Funding breakdown	Cannot start yet
This includes information about their fees and stipend, as well as the cash amount drawn from UKRI.	
UKRI grant details	Cannot start yet
This includes information about the different training grants associated with their studentship.	
Partnerships	Cannot start yet
This includes information about the different partnerships associated with their studentship.	
Declaration and submission	Cannot start yet

ADD STUDENT PERSONAL DETAILS

6.   Select 'Student Personal Detail's. Enter either the student's name (first or last name), ORCID or email address.

Create studentship

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Find a student record

Enter part of the student's name, ORCID or email address

[   ] Search

Return to overview
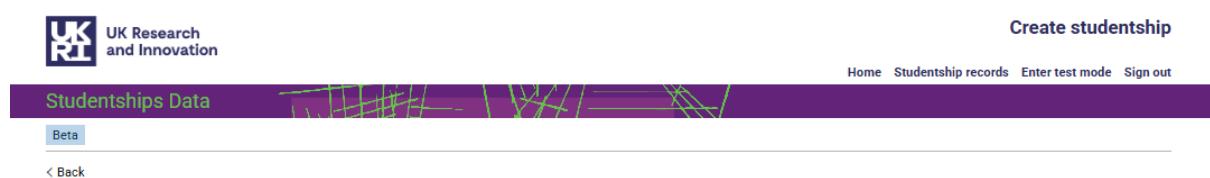
7.   The system will display the search results:

Find a student record

Enter part of the student's name, ORCID or email address

| test | ✕ | Search |

Found **22** records

Name	Email address	ORC ID	
TestStudentFN9TEST TestStudentSN9TEST	teststudentfntest@cambridge.com	3535-9898-0909-4444	Select
UAT Test User10 UAT Test User	uattestuser100@uattest.com	6575-9879-1000-1345	Select
UAT Test User9 UAT Test User	uattestuser99@uattest.com	7867-5656-9999-1229	Select
UAT Test User8 UAT Test User	uattestuser88@uattest.com	5555-3456-7654-0101	Select
UAT Test User7 UAT Test User	uattestuser77@uattest.com	7878-8787-4444-9901	Select
UAT Test User6 UAT Test User	uattestuser66@uattest.com	6758-8877-4450-0123	Select
UAT Test User5 UAT Test User	uatestuser55@uattest.com	2929-0909-0000-2343	Select
UAT Test User4 UAT Test User	uattestuser4@uattest.com	2323-6767-6666-7777	Select
UAT Test User3 UAT Test User	uattestuser3@uattest.com	9080-9090-7777-2233	Select
UAT Test User2 UAT Test User	uattestuser2@uattest.com	8989-8989-9090-0808	Select

Showing records **1** to **10**   Next →   Show 10 ⌄   Apply

If you cannot find the student in the system, create a new student record

Return to overview

8. Select the relevant student if they already exist.

If any of their personal details need updating, this can only be done once the Studentship record is complete. See the **How to Update Student Details** guide for instructions.

9. If the student is not on the system, select 'Create New Student Record' at the bottom and follow the screen instructions to create a record for the student. Complete all the details. Select Save & Continue when finished.

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Create studentship

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Studentships Data

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Student's name and date of birth

Creating a new student record

New records should only be created when students could not be found in the system.

Find an existing student record to use instead

First name

Preferred first name (optional)

Surname

Save and continue   Return to overview

10. Select the student's Registered Research Organisation

11. Select the student's relevant department

12. Enter the student's personal details:

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Personal details

Creating a new student record

New records should only be created when students could not be found in the system.

Find an existing student record to use instead

ORCID ID (optional)

Open Researcher and Contributor ID (ORCID) - a unique digital identifier for researchers and scholars.

Personal email address

Institutional email address

Date of birth

Day	Month	Year

Student's sex registered at birth

○ Female

○ Male

○ Information refused

○ Not available

Gender Identity
Is this the same as sex registered at birth?

◯ Yes

◯ No

◯ Prefer not to say

◯ Not available

Student's religion

[⌄]

Ethnic origin

[⌄]

Nationality

[⌄]

Does the student have an impairment, health condition, or learning difference that has a substantial impact on their ability to carry out day-to-day activities and has lasted, or is expected to last, at least 12 months?
Select at least one that applies

☐ No known impairment, health condition or learning difference

☐ Learning difference such as dyslexia, dyspraxia or AD(H)D

☐ Social/communication conditions such as a speech and language impairment or an autistic spectrum condition

☐ Long-term illness or health condition such as cancer, HIV, diabetes, chronic heart disease, or epilepsy

☐ Mental health condition, challenge or disorder, such as depression, schizophrenia or anxiety

☐ Physical impairment (a condition that substantially limits one or more basic physical activities such as walking, climbing stairs, lifting or carrying)

☐ D/deaf or have a hearing impairment

☐ Blind or have a visual impairment uncorrected by glasses

☐ Development condition that you have had since childhood which affects motor, cognitive, social and emotional skills, and speech and language

☐ An impairment, health condition or learning difference not listed above

☐ Prefer not to say

☐ Not available

Fee status

◯ Home

◯ International

[Save and continue] Return to overview

13. Once the Student Details are completed, select 'Studentship Details'

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Home   Studentship records   Enter test mode   Sign out

Studentships Data

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Create Studentship

Your reference number SDD-000000415

Form incomplete

You have completed 1 of 6 sections.

Student personal details Basic information about their name, research organisation, email address and equality, diversity and inclusion (EDI) profile.	Completed
Studentship details This includes information about their funding dates and project details.	Not yet started
Funding breakdown This includes information about their fees and stipend, as well as the cash amount drawn from UKRI.	Not yet started
UKRI grant details This includes information about the different training grants associated with their studentship.	Not yet started
Partnerships This includes information about the different partnerships associated with their studentship.	Not yet started
Declaration and submission	Cannot start yet

View all incomplete records   Delete and start again

14. Complete the details as instructed on the screens selecting 'Save & Continue' to progress. Once all the details are completed, you can check and change your answers:

Check your answers for the studentship details section

Studentship basic details

Lead research organisation	Essex University	Change
Studentship scheme	AHRC Doctoral	Change
SID (optional)		Change
RO reference (optional)		Change
Expected Qualification Level	Other postgraduate (taught)	Change

Funding and thesis dates

Studentship funding start date	1 January 2026	Change
Studentship funding end date	1 January 2028	Change
Expected thesis submission date	1 January 2028	Change
Full-time percentage	100%	Change

Project details

Project title	Test project titel	Change
Project summary	Test project summary	Change
Has the ethical information on the project been taken into account, with plans in place to address any issues highlighted?	No	Change
Trusted Research and Innovation – You must ensure that the research and training undertaken as part of this studentship is carried out in accordance with all applicable legal and regulatory requirements as set out in the UKRI training grant terms and conditions. Please confirm that you have reviewed this at the individual project level and have a plan in place to manage the risks.	No	Change

Save and continue   Return to overview

15. Select 'Save & Continue to progress to Funding Breakdown:

16. Complete the details as instructed on the screens. Select 'Save & Continue' to commit the changes.

17. Next complete the 'UKRI Grant Details'.

18. Complete the grant details as instructed on the screen:

19. Next complete the 'Partner Details':

20. Enter the partnership details as instructed on the screen. If there are partners, select 'Yes' otherwise select 'No'.

21. If there are Partners, search for the relevant partner organisation as directed on the screen:

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Partner details

Associate one or more partner organisations with the studentship. Start by using the link below to find an organisation in the system.

Partner organisation 1

Partner organisation   Search for partner organisation

Add another partner organisation

Save and continue   Return to overview

22. Enter the search criteria:
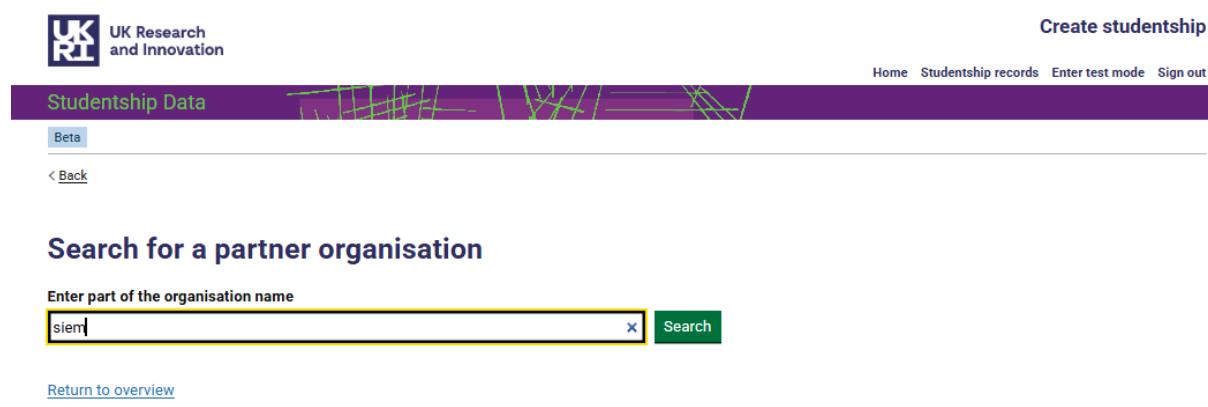
23. Select the relevant partner organisation from the search results if the correct one is shown, otherwise, you can create a new partner organisation record by selecting 'Add a new partner organisation':

24. To add a new organisation, enter the details shown on the screen:

25. Select 'Create and continue' and then complete the Partner Details screen that follows:

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Partner details

Associate one or more partner organisations with the studentship. Start by using the link below to find an organisation in the system.

Partner organisation 1

Partner organisation   SQ Test Partner organisation   Change

Sector
Add the sector that the partner is from

( ) Institutional

( ) UK Public Sector

( ) UK Private Sector

( ) UK Third Sector

( ) International

Partnership start date
Start date of partner involvement with individual studentship

Day   Month   Year

[ ] [ ] [   ]

Partnership end date
End date of partner involvement with individual studentship

Day   Month   Year

[ ] [ ] [   ]

Formal collaboration type

( ) Funding contribution (providing funding for some elements of the studentship)
The partner is providing funding support for some of the costs associated with the studentship.

( ) Match funding (providing funding for all elements of the studentship)
The partner is providing funding for all elements of the studentship that the UKRI funding covers.

( ) Collaborative studentship
The studentship has been developed in partnership between an academic and non-academic organisation

( ) Placement
Period of work experience that is a formal, integrated part of the studentship

( ) Internship
A short-term work experience that is not directly linked to the studentship

Total cash contribution
Total cash contribution that the partner is making to the studentship for the full duration.

[£ |]

Percentage of funding from partner
Total percentage provided by the partner over the duration of the studentship. This should be the total per individual partner.

[| %]

Percentage of funding from grant
Total percentage drawn from UKRI training grants for the duration of this partnership

[| %]

Is the project partner providing supervision?

( ) Yes

( ) No

[Add another partner organisation]

[**Save and continue**]   Return to overview

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26. Select 'Save and continue' to save your changes.

27. Finally complete the 'Declaration and Submission' section and select 'Create Studentship':

28. Tick the declaration box and select 'Create Studentship':

29. The system confirms that the Studentship record is created:

30. If your user role does now allow you to submit the studentship record, as soon as you select 'Declaration and submission', the system will inform you that the record needs to be approved by either a Lead Account holder or an Admin User. The system lists the email addresses of all the users in your organisation with approval permissions:

31. Below the list of email addresses, the system prompts you with the information you need to email to the approver:

What the lead user should do

Your lead users can select the View incomplete studentship records card on the homepage, select this draft studentship from the list and navigate to the Declaration and Submission section to complete the submission.

Draft reference number	SDD-000000554
Student	teststudent teststudent

Return to overview

32. The approver will then need to log in, check the record and submit it.

How to contact the UKRI Helpdesk

If you need help with this service, you can contact us either by:

Email: support@funding-service.ukri.org

Or call the UKRI Funding Service Helpline: +44 (0)1793 547 490
Staffed Monday to Thursday 8.30am to 5pm and Fridays 8.30am to 4.30pm (excluding bank holidays and other holidays)