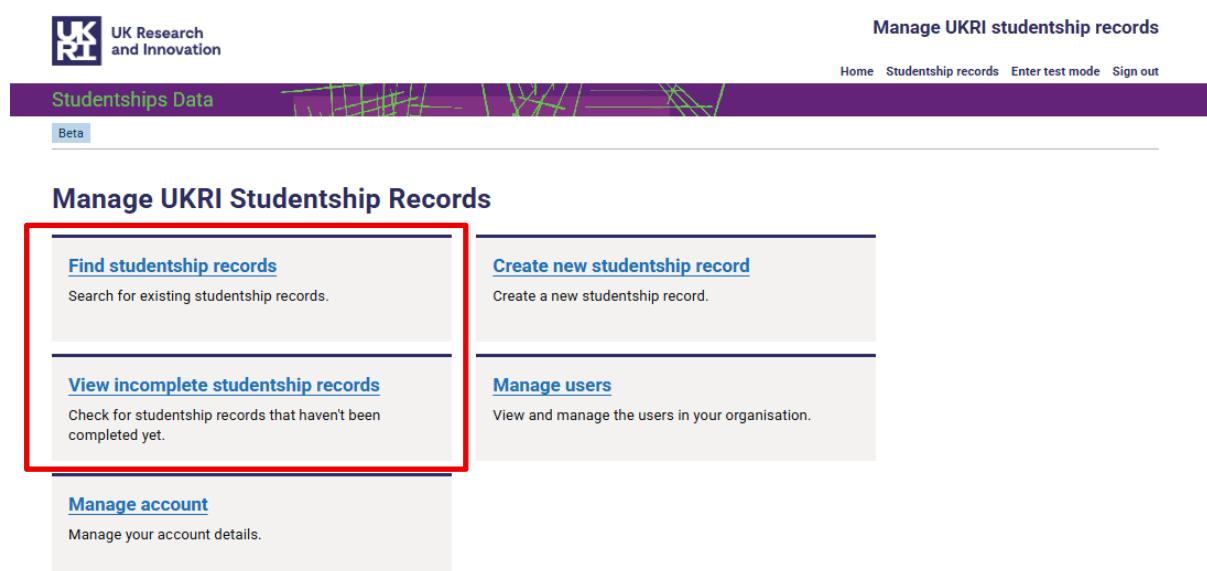


## How to create a studentship record

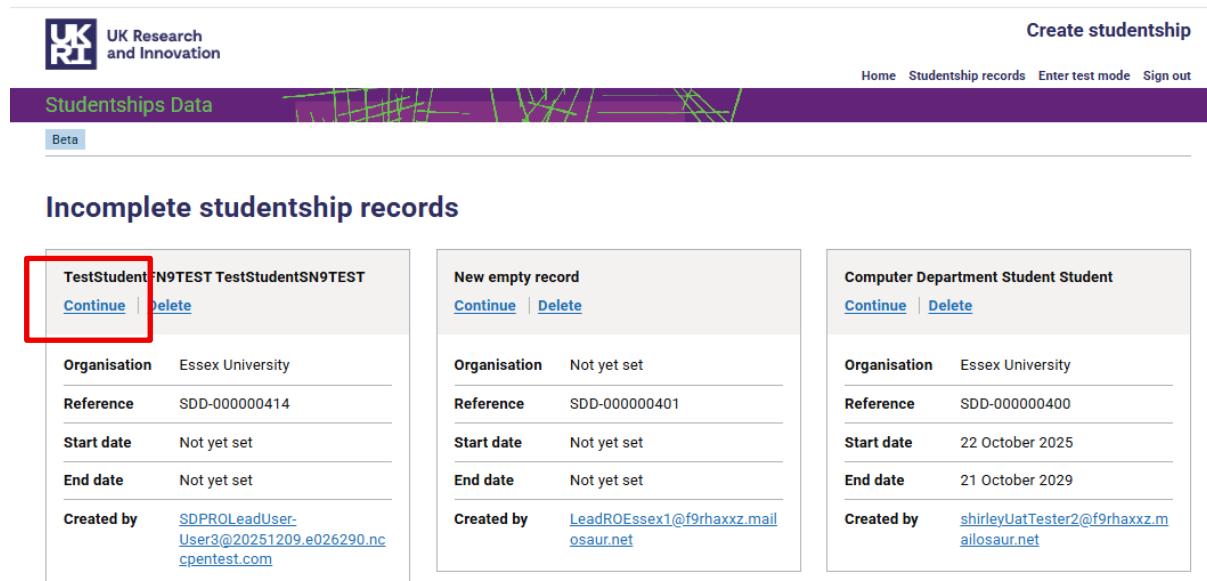
### CHECK STUDENTSHIP DOESN'T ALREADY EXIST

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



The screenshot shows the 'Manage UKRI Studentship Records' dashboard. At the top, there are links for 'Manage UKRI studentship records', 'Home', 'Studentship records', 'Enter test mode', and 'Sign out'. Below this is a purple header bar with the text 'Studentships Data' and a 'Beta' button. The main content area is titled 'Manage UKRI Studentship Records' and contains four sections: 'Find studentship records' (with a sub-link 'Search for existing studentship records'), 'Create new studentship record' (with a sub-link 'Create a new studentship record'), 'View incomplete studentship records' (with a sub-link 'Check for studentship records that haven't been completed yet'), and 'Manage users' (with a sub-link 'View and manage the users in your organisation'). The 'View incomplete studentship records' section is highlighted with a red box.

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



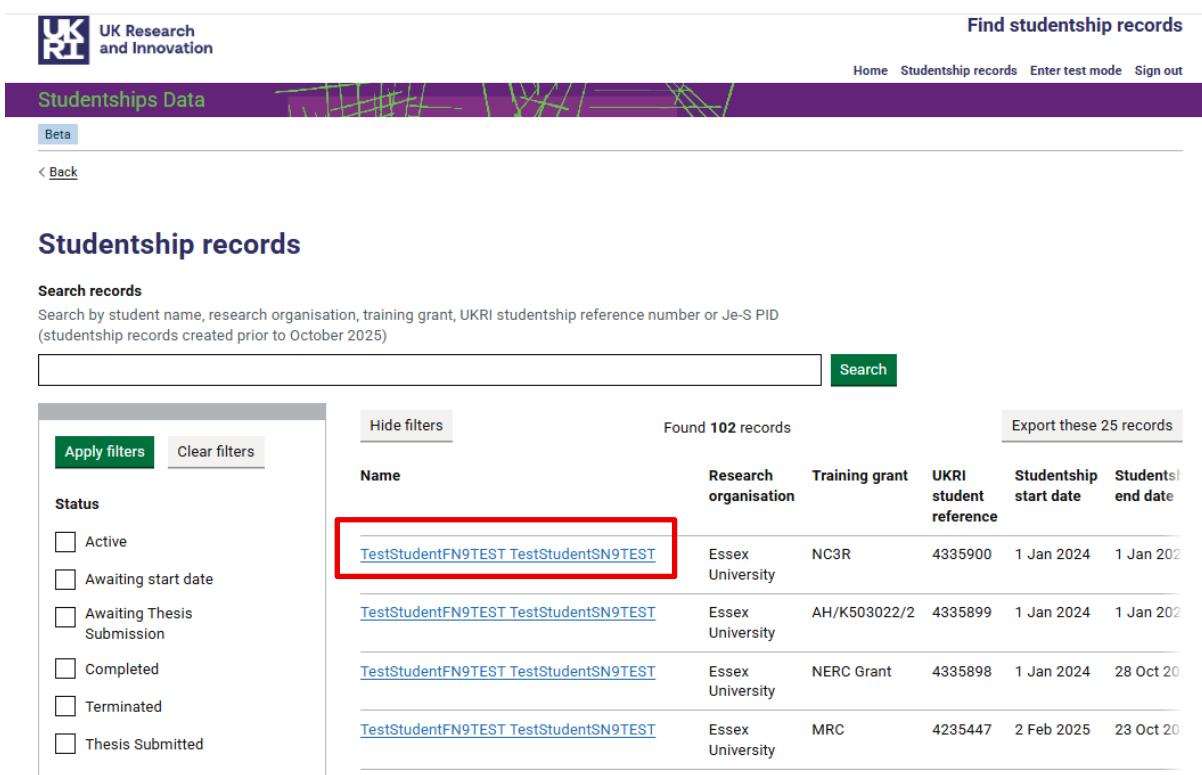
The screenshot shows the 'Incomplete studentship records' list page. At the top, there are links for 'Create studentship', 'Home', 'Studentship records', 'Enter test mode', and 'Sign out'. Below this is a purple header bar with the text 'Studentships Data' and a 'Beta' button. The main content area is titled 'Incomplete studentship records' and lists three records:

- TestStudentSN9TEST TestStudentSN9TEST (highlighted with a red box)
- New empty record
- Computer Department Student Student

Each record has 'Continue' and 'Delete' links. Below each record is a table with the following data:

Organisation	Essex University
Reference	SDD-000000414
Start date	Not yet set
End date	Not yet set
Created by	<a href="#">SDPROLeadUser-User3@20251209.e026290.ncpcentest.com</a>

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



**Find studentship records**

Home Studentship records Enter test mode Sign out

Studentships Data

Beta

< Back

## Studentship records

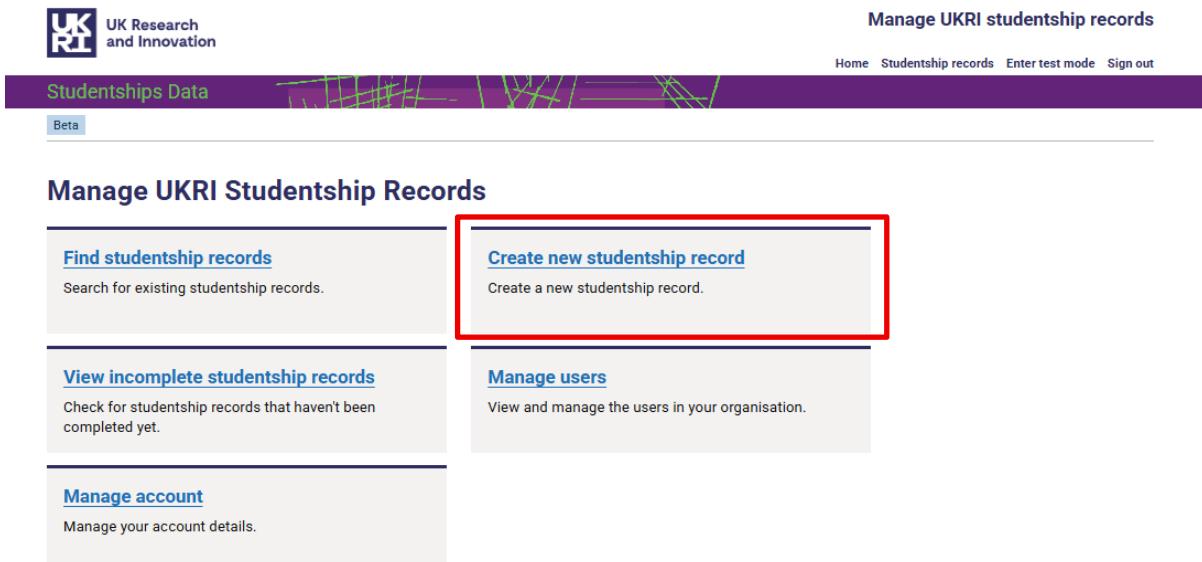
**Search records**  
Search by student name, research organisation, training grant, UKRI studentship reference number or Je-S PID (studentship records created prior to October 2025)

Search

		Found 102 records		Export these 25 records			
		Name	Research organisation	Training grant	UKRI student reference	Studentship start date	Students end date
<b>Apply filters</b>		<a href="#">TestStudentFN9TEST TestStudentSN9TEST</a>	Essex University	NC3R	4335900	1 Jan 2024	1 Jan 202
<b>Clear filters</b>		<a href="#">TestStudentFN9TEST TestStudentSN9TEST</a>	Essex University	AH/K503022/2	4335899	1 Jan 2024	1 Jan 202
		<a href="#">TestStudentFN9TEST TestStudentSN9TEST</a>	Essex University	NERC Grant	4335898	1 Jan 2024	28 Oct 20
		<a href="#">TestStudentFN9TEST TestStudentSN9TEST</a>	Essex University	MRC	4235447	2 Feb 2025	28 Oct 20

## CREATE NEW STUDENTSHIP RECORD

4. If the record does not exist, from the Dashboard select 'Create New Studentship Record'



**Manage UKRI studentship records**

Home Studentship records Enter test mode Sign out

Studentships Data

Beta

## Manage UKRI Studentship Records

[Find studentship records](#)  
Search for existing studentship records.

[Create new studentship record](#)  
Create a new studentship record.

[View incomplete studentship records](#)  
Check for studentship records that haven't been completed yet.

[Manage users](#)  
View and manage the users in your organisation.

[Manage account](#)  
Manage your account details.

5. Complete the Studentship Record in succession starting with the Student Personal Details. Each section will need to be completed in order.



## Create Studentship

Your reference number SDD-000000415

### Form incomplete

You have completed 0 of 6 sections.

#### [Student personal details](#)

Basic information about their name, research organisation, email address and equality, diversity and inclusion (EDI) profile.

[Not yet started](#)

#### [Studentship details](#)

This includes information about their funding dates and project details.

[Cannot start yet](#)

#### [Funding breakdown](#)

This includes information about their fees and stipend, as well as the cash amount drawn from UKRI.

[Cannot start yet](#)

#### [UKRI grant details](#)

This includes information about the different training grants associated with their studentship.

[Cannot start yet](#)

#### [Partnerships](#)

This includes information about the different partnerships associated with their studentship.

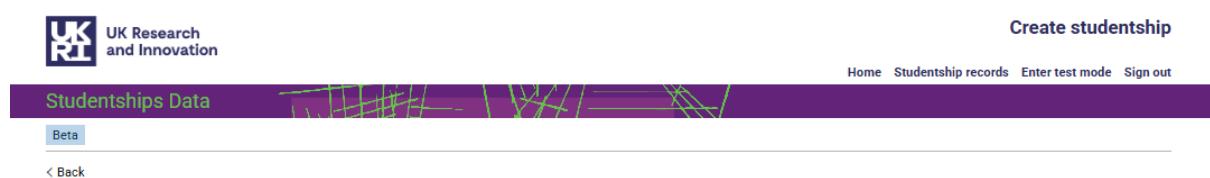
[Cannot start yet](#)

#### [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.



7. The system will display the search results:

## Find a student record

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

 X Search

Found 22 records

Name	Email address	ORC ID	
TestStudentFN9TEST TestStudentSN9TEST	teststudentfntest@cambridge.com	3535-9898-0909-4444	<a href="#">Select</a>
UAT Test User10 UAT Test User	uattestuser100@uattest.com	6575-9879-1000-1345	<a href="#">Select</a>
UAT Test User9 UAT Test User	uattestuser99@uattest.com	7867-5656-9999-1229	<a href="#">Select</a>
UAT Test User8 UAT Test User	uattestuser88@uattest.com	5555-3456-7654-0101	<a href="#">Select</a>
UAT Test User7 UAT Test User	uattestuser77@uattest.com	7878-8787-4444-9901	<a href="#">Select</a>
UAT Test User6 UAT Test User	uattestuser66@uattest.com	6758-8877-4450-0123	<a href="#">Select</a>
UAT Test User5 UAT Test User	uattestuser55@uattest.com	2929-0909-0000-2343	<a href="#">Select</a>
UAT Test User4 UAT Test User	uattestuser4@uattest.com	2323-6767-6666-7777	<a href="#">Select</a>
UAT Test User3 UAT Test User	uattestuser3@uattest.com	9080-9090-7777-2233	<a href="#">Select</a>
UAT Test User2 UAT Test User	uattestuser2@uattest.com	8989-8989-9090-0808	<a href="#">Select</a>

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.

**Studentships Data** Create studentship

Beta Home Studentship records Enter test mode Sign out

← Back

**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

UKRI UK Research and Innovation [Create studentship](#)

Home Studentship records Enter test mode Sign out

Studentships Data 

Beta [Back](#)

### Student's research organisation (Registered RO)

Use the links below to search for and select the student's research organisation and department.

**Registered research organisation**  
This is the research organisation that the student is registered with, which will be awarding the degree.

[Search for a research organisation](#)

[Save and continue](#) [Return to overview](#)

## 11. Select the student's relevant department

Studentships Data 

Beta [Back](#)

### Student's research organisation (Registered RO)

Use the links below to search for and select the student's research organisation and department.

**Registered research organisation** Essex University [Change](#)  
UO1154932

This is the research organisation that the student is registered with, which will be awarding the degree.

**Department** [Select a department](#)

[Save and continue](#) [Return to overview](#)

## 12. Enter the student's personal details:

 and Innovation

Studentships Data 

Beta

< Back

[Home](#) [Studentship records](#) [Enter test mode](#) [Sign out](#)

## 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

## STUDENTSHIP DATA SYSTEM

---

**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'



## Create Studentship

Your reference number SDD-000000415

### Form incomplete

You have completed 1 of 6 sections.

#### Student personal details

Completed

Basic information about their name, research organisation, email address and equality, diversity and inclusion (EDI) profile.

#### Studentship details

Not yet started

This includes information about their funding dates and project details.

#### Funding breakdown

Not yet started

This includes information about their fees and stipend, as well as the cash amount drawn from UKRI.

#### UKRI grant details

Not yet started

This includes information about the different training grants associated with their studentship.

#### Partnerships

Not yet started

This includes information about the different partnerships associated with their studentship.

#### 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:

UKRI
UK Research  
and Innovation
Create studentship

Home
Studentship records
Enter test mode
Sign out

Studentships Data
TITLE
V4.1
TEST

Beta
< Back

**Check your answers for the studentship details section**

**Studentship basic details**

Lead research organisation	Essex University	<a href="#">Change</a>
Studentship scheme	AHRC Doctoral	<a href="#">Change</a>
SID (optional)		<a href="#">Change</a>
RO reference (optional)		<a href="#">Change</a>
Expected Qualification Level	Other postgraduate (taught)	<a href="#">Change</a>

**Funding and thesis dates**

Studentship funding start date	1 January 2026	<a href="#">Change</a>
Studentship funding end date	1 January 2028	<a href="#">Change</a>
Expected thesis submission date	1 January 2028	<a href="#">Change</a>
Full-time percentage	100%	<a href="#">Change</a>

**Project details**

Project title	Test project title	<a href="#">Change</a>
Project summary	Test project summary	<a href="#">Change</a>
Has the ethical information on the project been taken into account, with plans in place to address any issues highlighted?	No	<a href="#">Change</a>
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	<a href="#">Change</a>

[Save and continue](#)
[Return to overview](#)

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

RO How To Create A Studentship Record V1.1

Page 9 of 18

## Create Studentship

Your reference number SDD-000000415

## Form incomplete

You have completed 2 of 6 sections.

## Student personal details

Completed

Basic information about their name, research organisation, email address and equality, diversity and inclusion (EDI) profile.

## Studentship details

Completed

This includes information about their funding dates and project details.

## Funding breakdown

Not yet started

This includes information about their fees and stipend, as well as the cash amount drawn from UKRI.

## UKRI grant details

Not yet started

This includes information about the different training grants associated with their studentship.

## Partnerships

Not yet started

This includes information about the different partnerships associated with their studentship.

## Declaration and submission

Cannot start yet

[View all incomplete records](#) [Delete and start again](#)

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

&lt; Back

## Funding breakdown

Enter a row for each year's financial information. Use the *Add another financial year* button to add rows.To edit or delete rows, click the checkbox for the row you want to edit then click the *Edit selected row* or *Delete selected row(s)* button.

Academic year	Annual fees rate (FTE)	Annual stipend rate (FTE)	Actual fee amount	Cash drawn from grant for fees	Actual stipend amount received	Cash drawn from grant for stipend	% funding drawn from partnerships	% funding drawn from grant
<input type="checkbox"/> 2025-26	£13	£100	£100	£100	£100	£100	1%	99%

[Add another financial year](#)[Edit selected row](#)[Delete selected row\(s\)](#)[Save and continue](#)[Return to overview](#)

17. Next complete the 'UKRI Grant Details'.



Section	Status
Student personal details	Completed
Studentship details	Completed
Funding breakdown	Completed
UKRI grant details	Not yet started
Partnerships	Not yet started
Declaration and submission	Cannot start yet

## Create Studentship

Your reference number SDD-000000415

### Form incomplete

You have completed 3 of 6 sections.

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

[View all incomplete records](#) [Delete and start again](#)

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



Grant name	NERC GRANT	<a href="#">Change</a>
Grant funding start date	1 December 2025	<a href="#">Change</a>
Grant funding end date	2 December 2029	<a href="#">Change</a>
Lead grant	This is the lead grant	<a href="#">Change</a>
Is there a strategic link to another grant-funded project?	No	<a href="#">Change</a>

### Check your answers for the UKRI grant details section

#### UKRI grant details

[Add or remove grants](#)

##### Grant 1

Grant name	NERC GRANT	<a href="#">Change</a>
Grant funding start date	1 December 2025	<a href="#">Change</a>
Grant funding end date	2 December 2029	<a href="#">Change</a>
Lead grant	This is the lead grant	<a href="#">Change</a>
Is there a strategic link to another grant-funded project?	No	<a href="#">Change</a>

[Save and continue](#)

[Return to overview](#)

## 19. Next complete the 'Partner Details':

**Create studentship**

Home Studentship records Enter test mode Sign out

Studentships Data 

Beta

## Create Studentship

Your reference number SDD-000000539

**Form incomplete**

You have completed 4 of 6 sections.

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

[View all incomplete records](#) [Delete and start again](#)

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

**Create studentship**

Home Studentship records Enter test mode Sign out

Studentships Data 

Beta

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### Does this studentship have any partner organisations?

A partner organisation is any external organisation (such as a business, charity, or another research organisation) that is formally collaborating on this studentship.

Yes

No

[Save and continue](#) [Return to overview](#)

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

[Beta](#)[Back](#)

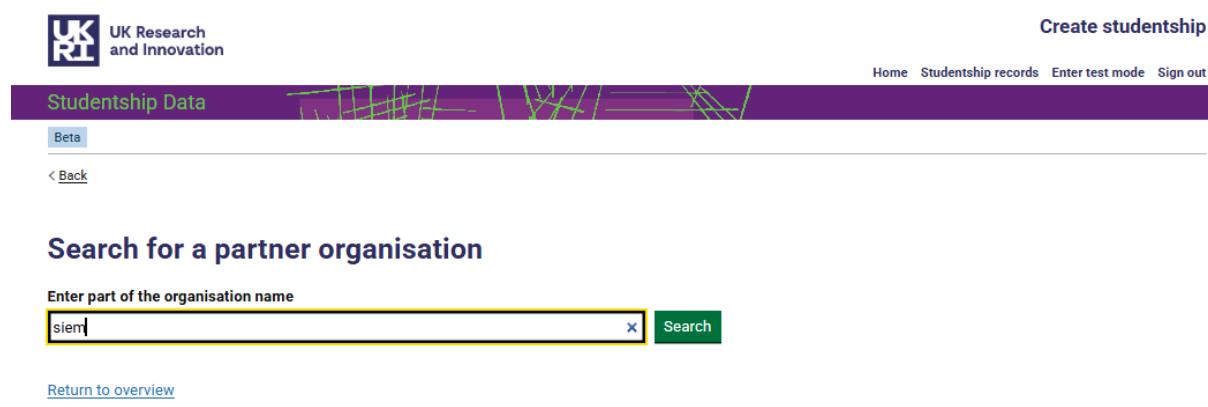
## Partner details

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	<a href="#">Search for partner organisation</a>

[Add another partner organisation](#)[Save and continue](#)[Return to overview](#)

22. Enter the search criteria:



UKRI UK Research and Innovation [Create studentship](#)

Home Studentship records Enter test mode Sign out

Studentship Data [TICKED](#) [VXED](#) [XED](#)

Beta

Back

### Search for a partner organisation

Enter part of the organisation name

 [Search](#)

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':

UK Research and Innovation

Create studentship

Home Studentship records Enter test mode Sign out

Studentship Data  Beta 

Search for a partner organisation

Enter part of the organisation name

Found 2 records

Name	Select
Siemens (Czechia)	<a href="#">Select</a>
Siemens (Brazil)	<a href="#">Select</a>

Showing records 1 to 2 Show

If you cannot find the partner organisation in the search results above, you can [add a new partner organisation](#)

[Return to overview](#)

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

UK Research and Innovation

Create studentship

Home Studentship records Enter test mode Sign out

Studentship Data  Beta 

Add a new partner organisation

Organisation name

First line of address

City

Postal code

Country

Organisation type

[Return to overview](#)

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

[Data](#)[Back](#)

## 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](#)

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

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

**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 5 of 6 sections.

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

[View all incomplete records](#) [Delete and start again](#)

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

**Create studentship**

Home Studentship records Enter test mode Sign out

**Studentships Data** 

**Beta**

[\*\*< Back\*\*](#)

## Declaration and submission

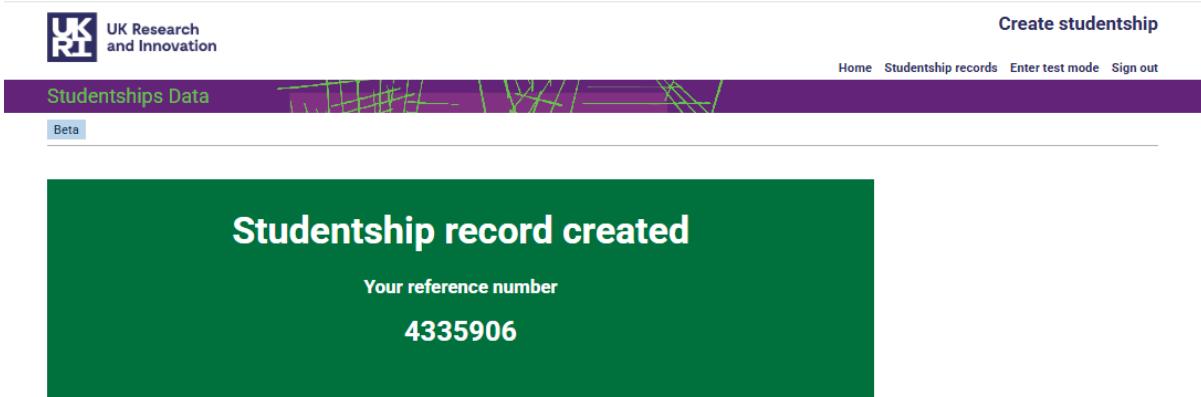
**Declaration**

Please confirm that the student has been made aware of how this data is shared with UKRI and how it will be used

Click the button below to create the Studentship record.

**Create studentship** [Return to overview](#)

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



UKRI UK Research and Innovation

Create studentship

Home Studentship records Enter test mode Sign out

Studentships Data

Beta

**Studentship record created**

Your reference number

**4335906**

### Next steps

[Print or download this studentship record](#)

[View studentship record](#)

[View all incomplete records](#)

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:



UKRI UK Research and Innovation

Create studentship

Home Studentship records Enter test mode Sign out

Studentship Data

Beta

Back

**A lead user must complete the creation of this studentship**

A lead account holder or Admin user must complete the creation of this studentship. Your user account is able to create draft studentship records, but a user with the Lead account holder or Admin user role is required to submit the new record.

Your organisation has the following lead account holders or Admin users:

Bell Thousand	bell-thousand@f9rhaxxz.mailosaur.net
test testing	several-wore@f9rhaxxz.mailosaur.net
Email Test	pool-deeply@f9rhaxxz.mailosaur.net
Third Deal	third-deal@f9rhaxxz.mailosaur.net
Essex Testing	name-over@f9rhaxxz.mailosaur.net
Different Toy	differ-toy@f9rhaxxz.mailosaur.net
Jane Doe	pendingtest44@f9rhaxxz.mailosaur.net
Email Template Temploate	emasitltemplate@f9rhaxxz.mailosaur.net

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](mailto: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)