

Joint Research Management Office Standard Operating Procedure for:

Studentship Funding Division of Responsibility

SOP Number:	102	Version Number:	1.01
Effective Date:	01/01/2026	Review Date:	01/01/2028

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Background:

Effective management of studentship and related research funding requires close coordination between Research Finance (RF) and the Doctoral College (DC). Responsibility for administering external studentship grants — including tuition fees, stipends, RTSG awards, and any associated post-doctoral funding can be divided across departments. These responsibilities include award setup, budget management, financial reconciliations, reporting, and project closure.

Historically, unclear boundaries between departmental roles have led to delays in submitting final claims, difficulties in resolving under- or overspends, and gaps in financial oversight and project ownership. To address these issues, this SOP establishes clear divisions of responsibility and outlines the processes to be followed from pre-award through post-award stages. By defining these roles and workflows, the procedure ensures funding is managed accurately and efficiently, in accordance with financial governance requirements, and that projects are allocated correctly between the DC and RF.

Purpose:

This document outlines the process for determining which department is responsible for administering external studentship funding and any related post-doctoral funding. It defines departmental

responsibilities, approval workflows, and communication protocols to support accurate, timely processing and robust financial oversight.

Scope:

This procedure applies to all external grants that provide funding for PhD studentships, including fees, stipends, and RTSG allocations, as well as any post-doctoral funding associated with these awards.

Abbreviations:

SOP	Standard Operating Procedure
RF	Research Finance
DC	Doctoral College
RTSG	Research Training Support Grant
PhD	Doctorate of Philosophy
DTE	Doctoral Training Entity
HEI	Higher Education Institution
DA	Directly Allocated
DI	Directly Incurred
UKRI	UK Research and Innovation

Definitions:

Studentship:

A studentship refers to a funding package or grant awarded to a student by one or more funding sources to support their university studies. Studentships may cover part or all of a student's tuition fees and typically include a stipend to support living costs. These awards are designed to enable and advance the student's research or academic work, and to foster their development as researchers or scholars.

Award Set-Up:

Creation of a record on the financial system in accordance with the funding agreement or contract, which sets out defined budgets and timelines.

Financial Governance:

The processes used by the departments to manage information in a compliant and controlled manner. This includes tracking financial transactions and operations, ensuring regulatory compliance, and maintaining effective data management and control practices.

Budget Management:

Ensuring that funds are limited to the awarded amount, used within a specified period, and for approved purposes only.

Worktribe (WT):

The university's internal system for costing, contracts, and grant applications is used to manage research projects during the pre-award stage.

Agresso/UNIT4 (UNIT4):

The University's financial management system is used to oversee and manage research projects once funding has been awarded.

Relevant SOPs:

- SOP | N/A

• SOP	N/A
• SOP	N/A

SOP Text:		
	Responsibility	Activity
1.	Doctoral College	Will be responsible for the post-award setup and financial administration of all DTEs, block studentship grants, and standalone studentships. This includes awards made directly to QMUL by external funders as well as those received from other HEIs through collaborative funding agreements. Management of these against will include (<i>but not limited to</i>) post-award setup on both Worktribe and Unit4, regular reconciliation and invoicing, management of extensions and supplements, and final reporting. Management of these grants may involve processing of some DA pay costs but should not generally include DI pay costs or recruitment approvals. The exception to this would be where studentship programmes have funding for DI administrative staff to manage the studentship grant. - <i>the DC will manage these roles.</i>
2.	Research Finance	Responsibility will be taken for the post-award setup and financial administration of all studentships funded under a broader research grant, as well as any post-doctoral grants or training awards that are awarded independently of previous studentship grants within the same programme. Any linked post-doctoral awards issued with a separate award letter must be created as a new record in Worktribe and managed independently from the original studentship award, including separate funder reporting by the Research Finance - <i>as a rule, if a grant does not include funding for studentship fees and/or stipends, these will be administered by RF.</i>
3.	Doctoral College & Research Finance	Any grants that do not fall within the categories listed above must be reviewed jointly by the JRMO and the Doctoral College to determine which team will assume responsibility. The Heads of the Doctoral College and Research Finance will make the final decision on these cases.
4.	Doctoral College	<u>Grant marked as successful on Worktribe:</u> - Once a notification is received that a grant application has been successful, RF will review and, if it includes funding for studentship, will notify DC. - Post-award liaison on Worktribe to be amended by the Doctoral College Research Finance Officer or the R&I Special Projects Finance Officer. - DC to manage post-award set up – budget review and submission for post-award approvals on Worktribe.
5.	Doctoral College	<u>UNIT4 Set Up:</u> DC to manage budget code allocation and Unit4 set up for all block studentship grants, DTEs, and standalone studentships.
6.	Research Finance	<u>UNIT4 Set Up:</u> RF to manage budget code allocation and Unit4 setup for any studentships attached to research grants and post-doctoral awards.

7.	Doctoral College	<u>Proactive Monitoring:</u> DC to manage DTEs, block studentship grants, and standalone studentships through regular reconciliations and communication with Faculty PGR & finance teams to ensure no unauthorised spend on grants.
8.	Research Finance	<u>Proactive Monitoring:</u> RF to monitor expenditure for research-grant-linked studentships and post-doc awards in line with standard RF processes.
9.	Doctoral College	<u>Financial Reporting:</u> Final reporting either directly to the funder through relevant portals or formats, and to lead HEI to be conducted by DC for block studentship grants, DTEs, and standalone studentships.
10.	Research Finance	<u>Financial Reporting:</u> All other final reporting to be conducted by RF in line with their standard processes.
11.	Doctoral College	<u>UKRI Studentship Data System:</u> The lead account holder within the Doctoral College (DC) shall be responsible for the management and administration of all user access to the UKRI Studentship Data System. The DC shall also determine, allocate, and maintain the appropriate access levels for all registered users
12.	Doctoral College & Research Finance	<u>Sickness/Leave of Absence cover:</u> Where sickness or leave leads to capacity constraints within the Doctoral College, Research Finance will assist with urgent activities. The scope and nature of this support shall be established through mutual discussion between the Head of the Doctoral College and the Head of Research Finance and signed off by the Director of Research Operations.

Change control

This section outlines changes from version **NA** to version **NA**

Section changed	Summary and description of changes

Supporting Documents List of associated documents

Document ref.	Document name

List of templates

Template ref.	Template name

List of appendices

Appendix ref.	Appendix name

EDGE Database Update
