



UK Research  
and Innovation

**Simpler and Better Funding**

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# **User Briefing The Funding Service**

**September 2023**

# Introduction

## Thank you

Thank you to all of you who have collaborated with UKRI to create the Funding Service (TFS). TFS will reduce the burden of effort, time and bureaucracy across grant processes, policies and systems.

The Service is being built iteratively. We regularly collect evidence and feedback from users that leads to improved functionality and a better user experience. There is still significant functionality to be added to deliver the Service by March 2025, and we welcome feedback from the community. You can provide direct [feedback](#) using the form on the Service.

## Getting to know The Funding Service

We encourage applicants to engage early with their Research Office, and for all users to familiarise themselves to ensure they are confident in using the Service prior to meeting application deadlines.

## About this slide deck

This slide deck has been produced to ensure that you have all the resources and materials you need to use the Service efficiently and expertly.

Within this deck then, you will find specific guidance and advice, FAQ's and links to training materials for:

- Applicants
- Research Offices
- Reviewers

# Why does UKRI need a new funding service?

**UKRI's Simpler and Better Funding (SBF) programme is creating a funding service that is easy to use and supports everyone involved in research funding.**

- UKRI supports multiple funding systems across its estate.
- Users currently have to interact with several systems, accounts and processes to apply for our funding
- Even within a single system, there are several ways to do the 'same thing'
- Our current research funding system is going out of service in Dec 2024

**We have an opportunity to do things better.**

# The Journey

## Transition from Je-S to the new Funding Service

Successive introduction of new features means new and current systems will run in parallel

New features piloted and introduced after testing and feedback from external and internal users

Research Opportunities will launch in the new service in increasing numbers through 2023

Live grants will be migrated onto the new service

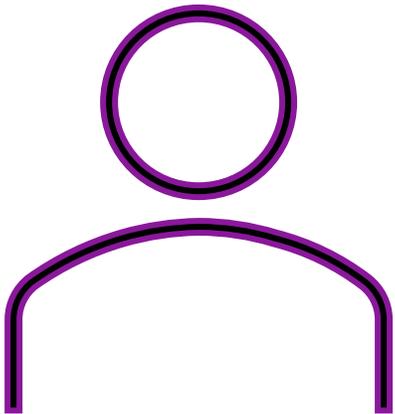


# Information for applicants

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# How TFS differs from Je-S for applicants

## Applicants



- No more single case for support as its replaced by specific questions
- A shift from pdfs to digital input i.e. a reduction in attachments
- More consistent questions, guidance and application journey across different councils and opportunities
- Guidance at the point of individual answers
- Less checking of page length, fonts and formatting as digital sections are automatically checked

At the moment only lead applicants can edit, view all details and submit applications on the service.

Future updates will make collaboration and co-editing within the service easier.

To find out how to use the Funding Service as an applicant visit [How applicants use the UKRI Funding Service – UKRI](#)



# How you can set up an account in the Funding Service

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# How to create an account – Project Leads

- You can only create an account when you start your first application using the service without needing research organisation verification.
- When a [funding opportunity](#) opens, its web page displays a 'start application' button.
- If you do not yet have a Funding Service account, you're able to create one before starting the application form.
- Je-S account information and history will not be transferred to the funding service

To create an account, you will need:

- To confirm you'll be leading the project, for example as a project lead or fellow
- the name of your organisation
- your email address

You will need to complete your diversity data before you can submit an application.

# Sign into your Funding Service account

If you have started an application or award, sign in to:

- complete your application
- view the status of your application
- manage an award

## [Sign in to your UKRI Funding Service account](#)

You'll need the email address and password you used when you started your application.



# Applying to an opportunity using the Funding Service

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# Find an open funding opportunity on ukri.org

We list open opportunities on ukri.org on the Funding Finder. Each funding opportunity web page gives guidance on:

- who is eligible to apply
- what we're looking for in applications
- how to apply, including all the questions you're asked in the Funding Service application form
- how we'll assess your application

You can:

- search opportunities using keywords
- find opportunities from specific councils
- see upcoming and closed opportunities

[Search funding opportunities](#)

[Watch a demonstration of finding an opportunity on ukri.org \(YouTube\).](#)

# How to add members of your core team

The application form asks you to:

- name the correct members of the project team who will be working on the project
- give each member a 'role' in the project – each funding opportunity has a specific set of roles to choose from

To help you assign roles to members of your team, see guidance on [role eligibility, responsibilities and costings](#).

Team members will receive an email asking them to confirm their details and complete their equality, diversity and inclusion profile. They will be able to see basic information about the application (application ID and title, the project lead, their role, application status)

# Completing your application

You are given the guidance on what the assessors are looking for:

- in the 'how to apply' section of the funding opportunity web page
- with each question in the Funding Service application form
- Complete most of your application using text boxes to answer questions in the online application form.
- You might need to complete some sections by uploading a PDF file.
- It is important that you ensure you allow time to review the application in 'read only view'.

[Watch a demonstration of completing an application \(YouTube\).](#)

- You can save your progress and return to your unfinished application later – which must be completed manually.
- You can monitor the progress of your application from submission to outcome using your Funding Service account.
- To share your draft digital application with collaborators, you can save it as a PDF using the 'print this page' option in the 'read application' view. PDF attachments will need to be download separately.



# Core question sets

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# We are introducing a core question set for different opportunity types

The question set reflects the basic criteria against which the applications will be assessed.

Applicants may also be asked to answer additional questions to provide additional information, such as:

- The make-up of the team
- Disciplinary-specific ethical questions

Guidance for specific opportunities will be published on the funding finder as each opportunity goes live

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## Overview of core areas for assessment

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### The vision of the project

What are you hoping to achieve with your proposed work?

### The approach to the project

How are you going to deliver your proposed work?

### The capability of the applicant(s) and the project team to deliver the project

Why are you the right individual or team to successfully deliver the proposed work?

This will follow the [Resume for Research and Innovation \(R4RI\)](#) type format. R4RI is a flexible narrative CV template already being used across many funding opportunities that require track record information.

### The resources requested to do the project

What will you need to deliver your proposed work and how much will it cost?

### The ethical and responsible research and innovation (RRI) considerations of the project

What are the ethical or RRI implications and issues relating to the proposed work? If you do not think that the proposed work raises any ethical or RRI issues, explain why.

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# New grant roles

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## Introducing a new set of common grant roles

- UKRI wants to widen the diversity of people and ideas who can be funded
  - A new set of standard grant roles will offer greater consistency across UKRI opportunities
  - Check the opportunity guidance to see which roles are available on our [website](#)
- ✓ **Everyone previously eligible to apply for funding will continue to be able to do so.**

### 12 harmonised roles:

- project lead
- project co-lead UK
- project co-lead (international)
- researcher co-lead
- fellow
- grant manager
- research and innovation associate
- visiting researcher
- specialist
- technician
- doctoral student
- professional enabling staff

# The new roles available

- Three completely new roles are now available in the Funding Service:
  - **Grant Manager** and,
  - **Professional Enabling staff** which will allow us to recognise professional enabling roles and professional grant managers more easily
  - **Specialist** which covers a range of non-technical roles such as survey specialists and graphic designers
- These new roles, along with the 'Technician' role are now eligible to attract indirect and estates costs. This addresses a financial barrier to research organisations' investing in technical and specialist roles, capabilities, and career pathways.
- The changes to costings apply to both the Funding Service and Je-S/Siebel for all opportunities launched from 22 May 2023.

Full guidance on the new roles and costings is available on the [UKRI website](#)

[You can read the previous announcement on our website.](#)



# Costings

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# A change in costings

- The cost of technicians and professional enabling staff who provide an 'underpinning' or support function that is not specific to the project being proposed are recovered through indirect and estates costs. Larger requested project specific costs will need to be fully justified.
- Although these roles are now eligible to attract indirect and estates costs, applying for these costs remains at the discretion of the research organisation.
- If the associated indirect and estates costs are applied for, research organisations should avoid double charging these roles by ensuring that:
  - the 'full time equivalent' of all roles 'directly allocated' or 'directly incurred' attracting indirect and estate costs on the award is included in the denominator of the research charge-out rates
  - costs of all roles 'directly allocated' or 'directly incurred' are excluded from the numerator of the research charge-out rates.

# How can your research office support you

If your organisation has a research office, the Funding Service notifies them when you create an application.

Your research office can:

- view your application while it is being completed
- provide offline support you as you complete it
- When all sections of your application are complete, send it to your research office so they can do a final check.
- The research office then submits the application to UKRI for assessment.

If your organisation does not have a research office, you can submit the application yourself using the service.

[How research offices use the UKRI Funding Service](#)

At present, only the Project Lead can edit the application. Research Office co-edit functionality is due to be introduced this Autumn.

While administrator functionality is under development we encourage applicants to collaborate with the Research



# Applicant FAQ's

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### **1. How can I improve my understanding of TFS and ensure I am able to meet application window deadlines?**

We recommend that you familiarise yourself with TFS as soon as you are able. Whilst we know many applicants start detailing their application on a Word doc, or another collaborative programme, we advise familiarising yourself with TFS and setting up an account ASAP to ensure you are able to use the Service quickly and efficiently when it is time to submit your application.

### **2. How do I create an account on The Funding Service?**

To do so you must first begin the process of applying for an opportunity, by clicking on the 'start application' link provided on the funding finder opportunity page.

### **3. How do I know if I am eligible to apply for UKRI funding?**

First please review our guidance on the UKRI website [Roles in funding applications: eligibility, responsibilities and costings guidance – UKRI](#). If you are still unsure you can email the helpdesk on [support@funding-service.ukri.org](mailto:support@funding-service.ukri.org).

### **4. Is it possible for the core team named on a Funding Service application to view/edit the application?**

Unfortunately, this functionality is not yet available for co-applicants or other members of the applicant team to view or edit an application. Core team members can read the application questions via the funding finder opportunity page to enable offline collaboration. As the Funding Service is being built iteratively, to allow us to conduct user-research, more and more functionalities will become available throughout 2023 and 2024. We will be adding editing rights for other staff at a future date and apologise for any inconvenience as we develop the system further.

### **5. How do I assign and choose which roles to assign to my team?**

To find out about different roles in funding opportunities, visit [Roles in funding applications – UKRI](#) applicants should check the see Funding finder for any call specifics e.g. use of project co-lead (international) and project partners.

### **6. How can I share my application across my team?**

By downloading and sharing a PDF. Please finalise your content offline before inputting it into the form for ease of collaboration.

**7. Can we have joint applications between several institutions?**

You're welcome to submit joint applications but the application must be submitted by a single project lead and organisation. Within the cost section of the application form you will be asked to breakdown cost by institution; however, the funding will flow through the lead organisation if successful.

**8. What if my organisation is not on the list given as options for the core team?**

If your organisation is not listed, please contact [support@funding-service.ukri.org](mailto:support@funding-service.ukri.org).

**9. How can I delete an obsolete application from the TFS system?**

Applications cannot be deleted at present. To help manage growing portfolios, the Project Lead can change the project title name to reflect this.

**10. Will formatting stay the same if copying and pasting text from word into the digital form?**

There may be some alterations to formatting needed after copying and pasting your text into the form, so we would recommend you check before submission to make sure you're happy with the presentation of your text.

**11. Is there a way to download a draft PDF of a full application?**

Yes, via the 'read view' tab in your application. Currently, the digital form content and completed attachments need to be downloaded separately.

**12. Is there a limit for funding we can apply for in the proposal?**

Limits are specified in the [UKRI Funding Finder guidance](#) for the opportunity you are applying to, but if you are unsure as to whether your proposed costs are suitable, please contact your relevant council to discuss. You can find out more about costs on the UKRI website [Roles in funding applications: eligibility, responsibilities and costings guidance – UKRI](#)

**13. Can we upload Embedded Images or Visual Evidence to support our application for responsive modes?**

Embedded images can be added to the Vision, Approach, Applicant and Team Capability to Deliver, and Ethics and RRI sections of the form in the following format for some councils.

JPEG, JPG, JPE, JFI, JIF, JFIF, PNG, GIF, BMP or WEBP format, and be smaller than 8MB.

For some councils, such as NERC attachments can be used for vision and approach

**14. There is no space to upload a cover letter or host organisation letter of support. Are these no longer needed?**

**How can I submit a cover letter?**

Within our opportunities' guidance on the [UKRI Funding Finder](#) you can find details about how to submit sensitive information regarding your application.

**15. Can applicants submit more than one application to the same scheme, or have an open application across more than one scheme at any time?**

UKRI considers that you should be responsible for determining your own research priorities, and you should normally only submit one proposal at any one time to the same scheme. If you choose nevertheless, to submit more than one proposal, then you must demonstrate that you will be able to carry out all the projects that are successful.

Please refer to the Funding finder for funding opportunity specifics on whether there are any restrictions on applications.

**16. Who should we include within the Résumé for Research and Innovation (R4RI) format?**

You and, if relevant, your team (project and project co-leads, researchers, technicians, specialists, partners etc.). As a minimum, all named members of the core team should be discussed. You can find guidance on the UKRI website [UKRI guidance on R4RI](#)

**17. Please can you advise where references, citations, or previous publication information should be listed within the application?**

All references section can only appear in the 'References' section (and not in the other sections of the form). Citations are likely to be used in the 'Vision', 'Approach' and 'Applicant and Team Capability' sections

**18. When can I expect a response from the UKRI helpdesk as to my enquiry?**

The helpdesk is absolutely committed to helping all users use the Funding Service as effectively and as quickly as possible. During busier periods, such as in autumn, when the helpdesk is experiencing a large numbers of enquiries they will prioritise those with an imminent opportunity deadline.



# Applicant training materials summary

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## Training videos now available for applicants

We are building a growing library of training videos for applications to the Funding Service, including:

- [How to find an opportunity using the Funding finder](#)
- [Completing an application in the Funding Service](#)
- [How to apply for an opportunity in the Funding Service](#)
- [Completing the 'resources and costs' section](#)
- [How to submit and manage applications, and see reviews](#)

You may also be interested in

- A recent Show on Tell on How to Apply' which you can watch on [YouTube](#).
- [what a research office administration account can view and do \(YouTube\)](#)

Training videos will get regularly reviewed and updated as the service evolves.

Coming up..

- How to apply – Step by step
- Expert review – Step by step
- Costings
- Panel

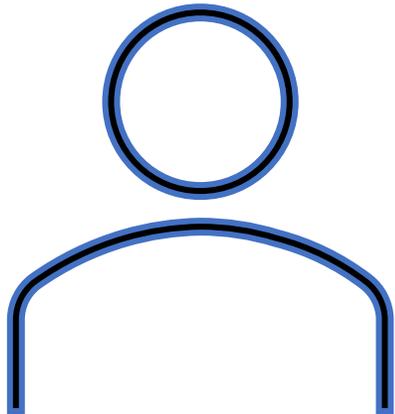


# Information for research offices

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# How TFS differs from Je-S for ROs

## Research Offices



- No more single case for support as its replaced by specific questions
- Visibility of applications as they are initiated
- Real time visibility of application status
- Fewer attachments to administer and more direct digital entry
- Less checking of page length and formatting
- Applicants do not require verification from their organisation to create an account, meaning ROs can check applicants are eligible before the application is submitted to UKRI.
- Over time, the checking and administrative burden imposed by Je-S will ease under TFS and make lives easier.

Add TFS' automated email address to your contacts to avoid emails going into your spam folder: [noreponse@funding-service.ukri.org](mailto:noreponse@funding-service.ukri.org)

To find out how to use the Funding Service as an RO visit [How research offices use the UKRI Funding Service – UKRI](#)



# Research office FAQ's

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### **1. How can I add people to the administration function within the Service?**

Please email the helpdesk on [support@funding-service.ukri.org](mailto:support@funding-service.ukri.org) with the details of who you would like to add to the administration function within the Service. Invites will then be sent out to those listed.

### **2. Is there functionality within application forms to allow research support staff to have access to edit?**

In the Funding Service, research officers with an administrator account can see when an application is first created and view all applications being prepared at their organisation. They can also return an application to an applicant for further editing. Research offices authorise and submit the application to UKRI. Research officer administrators can filter applications by status, sort applications by 'recently started' and 'ending soon,' and search for applications using key words. Some administrative functionality available on Je-S is not immediately available on the Funding Service, such as co-edit and filtering notifications. We are aware of these and understand that such capabilities will make it easier for research organisations to manage applications. The programme is continuing to work to improve research office functionality and will deliver improvements to the service during the autumn 2023. In the meantime, research organisations may need to adjust their own processes to manage applications and support applicants. Notice periods and key dates are published by councils in advance to enable research organisations to plan and put in place necessary adjustments to processes and internal deadlines.

### **3. Which funding service account type is most appropriate for research office staff to assist with the development of the proposal?**

At present, the Project Lead has responsibility for completing and editing their application. Research officers with an administrator account can see an application from when it is first created, and view all applications being prepared at their organisation. They can also return an application to an applicant for further editing. When ready, the Research officer can authorise and submit the application to UKRI. Research offices are responsible for managing their Funding Service accounts and there is a verification process in place to manage these. Find out more here <https://www.ukri.org/apply-for-funding/improving-your-funding-experience/how-research-offices-use-the-ukri-funding-service/>

#### **4. When will co-editing functionality be released?**

We are developing the Funding Service in an agile way, gradually introducing functionality and piloting new features and different funding types. After testing and user feedback, we continuously refine and enhance everything we do. Enhanced filtering and sorting of opportunities and applications have now been provided for Research Office administrators. Further functionality, such as advanced filtering is expected to be added shortly.

#### **5. Can an applicant download a PDF to share with research support for checks prior to submission?**

Yes – there is a read application tab from which a PDF of an application can be downloaded. Currently, the digital form content and completed attachments need to be downloaded separately.

#### **6. Once a Project Lead has submitted, who in the research office has access to submit?**

Once the Project Lead has submitted their application to their research office, any member of staff with a TFS Research Office account can submit to UKRI. Research organisations may have internal approval processes, so we recommend that Project leads and Research Officers work together in advance of submission deadlines to ensure a smooth process.

#### **7. Can research officers download completed applications, including all attachments, all at once rather than having to download each attachment individually?**

Currently, the digital form content and completed attachments need to be downloaded separately.

#### **8. When will we see additional guidance on the policy change about estates and indirect costs for technicians and enabling staff? Professional enabling staff such as project managers now attract overheads following the change in policy can you confirm this is correct?**

Information about grant roles can be found [here](#) on a page that was updated with further information on 4<sup>th</sup> July 2023. The UKRI terms and conditions guidance has also been updated and further information can be found [here](#).

**10. Do I only need to include facilities on the list? How will access to Research Council facilities be recorded within the proposal and managed in this round?**

You can include non-research council facilities in your costs section. Research Council facilities can be recorded within the 'facilities' section of the application, and guidance is available for each opportunity on the [UKRI Funding Finder](#).

**11. How do we manage grants post award in TFS?**

Post award is in the development pipeline and will be available on TFS in due course.

**12. Will there need to be a transference of data manually from je-s. E.G., will there be a need for a manual downloading of all applications that are on Je-s for research offices?**

At any one time, UKRI is managing several thousand live awards on Je-S. Once the award management development has sufficiently matured, these awards need to be migrated from Je-S to the Funding Service. This will be done in a planned, controlled and managed way collaboratively with councils, and grant holding organisations. This is not anticipated until 2024.

**18. When can I expect a response from the UKRI helpdesk as to my enquiry?**

The helpdesk is absolutely committed to helping all users use the Funding Service as effectively and as quickly as possible. During busier periods, such as in autumn, when the helpdesk is experiencing a large numbers of enquiries they will prioritise those with an imminent opportunity deadline.



# Training materials summary for research offices

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## Training videos now available for ROs

We are building a growing library of training videos for applications to the Funding Service, including:

- [Administrators and the UKRI Funding Service](#)
  - [how to complete the 'resources and costs' section of an application](#)
  - how to [submit and manage applications, and see reviews](#)
- 
- There are also some demonstrations and useful information from previous [UKRI's webinars](#)
  - You can also watch one of our recent Show and Tells for [research offices](#), on YouTube

Training videos will get regularly reviewed and updated as the service evolves.

Coming up..

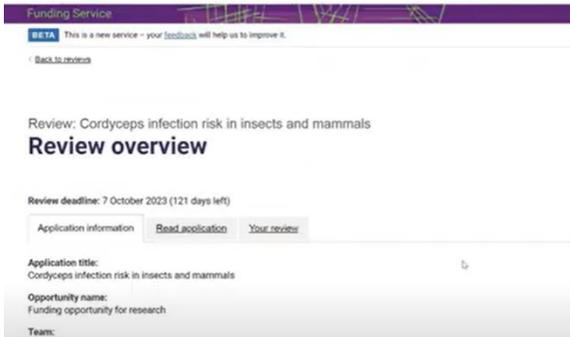
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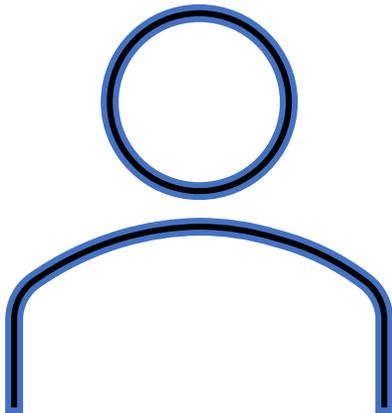
# Information for reviewers

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# How TFS differs from Je-S for reviewers



- Able to read the whole digital application on a single, easy-to-navigate screen or print as a PDF
- Creating a more consistent assessment criteria across UKRI
- Requiring applicants to attach fewer documents - the application only captures attachments that are essential for review
- Having all guidance documents in one place
- Access the relevant application information within the digital system, without the need to download multiple attachments - all easily navigable in the system
- The information for review is structured directly against the assessment criteria
- A simpler notification process



Add TFS' automated email address to your contacts to avoid emails going into your spam folder: [noreponse@funding-service.ukri.org](mailto:noreponse@funding-service.ukri.org)

To find out how to use the Funding Service as a reviewer visit [How reviewers use the UKRI Funding Service – UKRI](#)



# Reviewer FAQ's

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**1. Do I need to create an account in the Funding Service to complete a review?**

Yes. You can find advice on how to do so on [How reviewers use the UKRI Funding Service – UKRI](#) webpage

**2. What if I can't meet the deadline of the review?**

The deadline for the review is set automatically from TFS and is usually 21 days after you accept. It may, rarely, be less than 21 calendar days however - depending on the final review deadline set by UKRI for the funding opportunity.

If you are not able to meet the review deadline, contact the relevant council using their peer review email address to discuss a suitable deadline within the timeline for the funding opportunity.

As the deadline system is automated you may still get reminders asking you to meet the initial deadline set by the service. If you have already let your relevant council know you are unable to meet this, you can ignore the reminders.

**3. Where can I find advice on how to conduct a review?**

You can read some guidance on our webpage [How reviewers use the UKRI Funding Service – UKRI](#) which will run you through what constitutes a 'good' review as well as some guidance on scoring mechanisms.

**4. Can I cut and paste into the reviewer's text box?**

Yes, you can do this as you ordinarily would – likewise you can write your review directly into the text box.



# Reviewer training materials summary

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## Training videos now available for expert reviewers

- [Receiving an invitation](#)
- [Completing a review](#)

Training videos will get regularly reviewed and updated as the service evolves.

Coming up..

- How to apply – Step by step
- Expert review – Step by step
- Costings
- Panel



# How you can keep up to date

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# Find out more about the SBF programme

- [Attend the webinar](#) for Research Officer's on September 14
- [The Source](#)
- [UKRI website](#)
- Send your queries to [SBF@ukri.org](mailto:SBF@ukri.org)
- External Simpler and Better newsletter
- Sign up for User research by emailing: [userresearch@ukri.org](mailto:userresearch@ukri.org)

The screenshot shows the UKRI website header with the logo and navigation links. The main content area is titled 'Improving your funding experience' and includes a sub-section 'Using the new UKRI Funding Service' with two images and links: 'Using the new UKRI Funding Service for applicants' and 'Resume for Research and Innovation (R4RI)'. Below this is another section 'Simpler and Better Funding (SBF)' with three images and links: 'About Simpler and Better Funding', 'Our pathway for change', and 'Reducing research bureaucracy'.

The screenshot shows a page titled 'Simpler and Better Funding Programme' with the UKRI RoB logo. It features a list of links under the heading 'On this page you will find:'. A callout box on the right says 'Simpler and Better Funding is part of UKRI Organisational Change.' with a 'Back to Organisational Change' button. At the bottom right, it says 'For further information about Simpler and Better Funding, please explore our pages:'.

On this page you will find:

- Introduction to the Simpler and Better Funding Programme (SBF)
- What are we trying to achieve?
- Objectives
- Current timeline for the transition from Je-S to the Funding Service
- Pilot Opportunities
- Business Partners
- Contact details for further information
- Helpdesk
- [The Funding Service Manual Intervention Guidance Library](#)