

UKRI access fund for long form publications: Stage 2 application form guidance

Version 2.0

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Overview

Research organisations need to apply to UKRI's open access fund for longform publications via UKRI's Funding Service. This document provides guidance on completing the Stage 2 application form.

UKRI will use the information you provide about a publication (or set of publications) to verify:

- the publication(s) was approved at Stage 1
- the publication(s) is available open access immediately with a Creative Commons licence via the version of record.
- the costs claimed

UKRI will confirm if the publication(s) in an application will be supported via the open access fund for longform publication. For further information on payment timescales refer to the UKRI website at [Open access funding and reporting – UKRI](#)

Application form

A copy of the Stage 2 Funding Service form is provided below for reference, including supporting guidance notes.

A list of questions in the Stage 2 application form is available at Annex 1.

The application form can be accessed from the UKRI website at [Opportunities – UKRI](#)

Confirm you'll be leading this project if your application is successful

Confirm you'll be leading this project if your application is successful

We strongly advise that you only start this application if you'll be the project lead (or the fellow, if you're applying for a fellowship Opportunity).

If you're just curious about the application questions, or any guidance for completing them, you can find this information on the funding Opportunity's page in the [UKRI Funding Finder](#)

Confirmation

I confirm that I'll be leading my project, and I understand that:

- the only people who can edit the application are myself and staff at my research office, if I have one
- if I have a research office, only it can submit the application to UKRI

[Confirm and continue](#)

N.B: Applications for this fund must be completed by the research office, library or other department or team that is responsible for open access within the research organisation. For this funding opportunity, you will be based in that relevant department and be the project lead for this opportunity.

The project lead is responsible for completing the application process on the UKRI Funding Service.

A research office administrator will usually need to submit the application to UKRI. If a research organisation does not have a research office, the Project Lead who is completing the form can submit the application to UKRI.

See [How applicants use the UKRI Funding Service](#) for guidance on using the Funding Service.

Do you have a Funding Service account?

Do you have a UKRI Funding Service account?

You cannot use your Je-s sign-in details to apply for this Opportunity.

- Yes, I want to sign in
- No, I want to create an account

Continue

N.B: Information on how to create an account is available at Annex 2.

Sign in

Sign in

Email address

Password

 [Show](#)

[I have forgotten my password](#)

Sign in

On whose behalf are you applying for this opportunity?

On whose behalf are you applying for this Opportunity?

Organisation

Research organisation name

[Apply with a different organisation](#)

Confirm

N.B: The Funding Service will display the organisation that you selected when you created your account.

Application overview

Application overview

Write application

Read application

[1. Details](#)

Incomplete 

[2. Core team](#)

Incomplete 

[3. Publications](#)

Incomplete 

Submitting this application to UKRI

Only your research office can submit applications to UKRI. You'll need to send the application to them first.

[Send to research office](#)

Details

Details

Provide the total number of publications that you are including in this application to UKRI.

If your organisation is submitting more than one application to UKRI in one month you should indicate this, for example, for the second application in a single month enter 'University of X, September 2023, 2'.

Summary

Provide the total number of publications that you are registering with UKRI

▼ [Guidance for writing a summary.](#)

For the application summary you should:

- provide the total number of publications that you are including in this application to UKRI, for example 'one monograph; two book chapters.'
- state if you are requesting costs for third party content, for example 'We are requesting costs for third party content as part of this application.'
- Include any additional information about a publication included in this application here, if needed.

Full guidance on how to complete a Stage 2 application to this fund is available at [Guidance for UKRI's open access fund for long-form publications – UKRI.](#)

Paragraph ▼ **B** *I* x^2 x_2 ☰ ☷ ☹ ☺ ?

You have 50 words remaining

Core team

Core team

The core team includes all the named individuals who are crucial to the success of your project.

[Add team member](#)

Name	Email	Role	Organisation
Your name	Your email address	Assign role	Your organisation name

N.B: If the administrative contact for the application is not the project lead you can add them to the application as the professional enabling staff by clicking “Add team member”. This will be the individual at your organisation who will manage the award (for example, a librarian, research manager, or other).

Add team member

Assign role

Add team member

Assign role

Project lead

Responsible for the intellectual leadership and overall management of the project (affiliated with the lead organisation)

Professional enabling staff

Makes significant professional contributions to the project in areas such as finance, accounting and marketing (employed by the lead or one of the collaborating organisations)

[Continue](#)

N.B.: You do not need to add ‘Professional Enabling Staff’ if the Project Lead is also the administrative contact for this application. Guidance on how to add Professional Enabling Staff’ is below.

Search for team member's organisation

Add team member

Search for the team member's organisation

You can search for the organisation's full name, or part of it

Search

Team member's details

Add team member

Team member's details

Role

Professional enabling staff

[Change](#)

First name

Last name

Email address

Organisation

Research organisation name

[Change](#)

Save and continue

[Cancel and return to Core](#)

Publications

Publications

Copy and paste the completed Stage 2 table of questions with details of the monographs, edited collections, and book chapters that your organisation is claiming funds for from UKRI in this application.

▼ [What the assessors are looking for in your response](#)

To complete this section:

1. Download and complete the [Stage 2 table of questions document](#) by opening the link in a new tab
2. Copy and paste the table into this text box
3. Upload a single PDF containing the corresponding invoice(s) for all publications in this section of the application
4. Mark this section complete.

Applications that use a different format to submit the application will not be considered.

Paragraph ▼ **B** *I* U x^2 x_2

You have 10000 words remaining

File upload

▼ [Guidance for file upload](#)

Save invoices in a single PDF no larger than 8MB. The invoices should appear in the order in which the publications are included in the table.

For the file name, use the unique UKRI Funding Service number the system gives you when you create an application, followed by 'your organisation name_invoices'

Unless specifically requested, please do not include any sensitive personal data within the attachment.

No file chosen

Read application

Once you have completed the application form you can view how it will appear to UKRI in the 'Read application' view.

Application overview

[Write application](#) [Read application](#)

Contents

- [Top of page](#)
- [1. Details](#)
- [2. Core team](#)
- [3. Publications](#)

[Print this page](#)

This is what your application will look like.

University of X, March 2024

1. Details [Edit](#)

Summary

2 book chapters and 1 monograph.

The monograph has been published via Publisher A's diamond model.

We are requesting costs for clearing third party content for the monograph in this application.

2. Core team [Edit](#)

Name	Role	Organisation	Email
First Name Last Name	Project lead	University of X	Email address

3. Publications [Edit](#)

[View application question](#)

Stage 1 reference	UKRI funding reference	Publication type	Author name(s)	Title of publication
	For example ES/X000000/0			
ANON-XoXX-oXoX-X-5-1	ES/X000000/0	Monograph	FirstName LastName	A most excellent monograph
ANON-YoYY-oYoY-Y-1-1	AH/X000000/0	Book chapter	FirstName1 LastName1; FirstName2 LastName2;	A most excellent book chapter
ANON-ZoZZ-oZoZ-Z-7-5	EP/X000000/0	Book chapter	Initial, LastName	Another excellent book chapter

[APPXXX_University of X_invoices.pdf](#) 0.09MB

N.B: you can use the grey horizontal bar in the 'Publications' section to scroll across and see the full details provided per publication. An example is provided below.

3. Publications

[Edit](#)

ISBN	Publication identifier For example DOI (OPTIONAL)	Do you confirm that this is the only claim for open access funds for this publication from UKRI? Yes / No	Open access costs requested from UKRI	Total open access costs
000-0-0000-0000-0	https://doi.org/XXXXXX	Yes	£4,000.00	N/A
000-0-0000-0000-1		Yes	£400.00	£400.00
000-0-0000-0000-2		Yes	£1,000.00	£1,200.00

Annex 1: List of questions in the Stage 2 application form

To help you plan and prepare your Stage 2 application to claim back open access funds via UKRI's open access fund for longform publications we include a list of the form questions below. An Excel spreadsheet containing a table version of these questions can also be found on our website. **The Excel version is the one that you must download and complete for the 'Publications' section.**

This is to help you prepare and collect information prior to using the Funding Service.

For further details, including guidance on answering the questions, please refer to the main section of this guide.

Details:

Information required	Mandatory?	Other details
Enter your organisation name, month, and year that you are submitting your application.	Yes	If your organisation is submitting more than one application to UKRI in one month you should indicate this, for example, for the second application in a single month enter 'University of X, September 2023, 2'.
Summary	Yes	<p>Provide the total number of publications that you are including in this application to UKRI.</p> <p>For the application summary you should:</p> <ul style="list-style-type: none"> • provide the total number of publications that you are including in this application to UKRI, for example 'one monograph; two book chapters.' • state if you are requesting costs for third party content, for example 'We are requesting costs for third party content as part of this application.' • any additional information about a publication included in this application here, if needed. <p>Full guidance on how to complete a Stage 2 application to this fund is available at Guidance for UKRI's</p>

		open access fund for long-form publications – UKRI. This section has a 50 word-limit.
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Core team:

Information required	Mandatory?	Other details
Select the team members for this application	Yes	<p>The options available are:</p> <ul style="list-style-type: none"> • Project lead • Professional enabling staff <p>If the administrative contact for this application is not the project lead, please add this person as professional enabling staff. This will be the individual at your organisation who will manage the award (for example, librarian, research manager, or other).</p> <p>You do not need to add a professional enabling staff if the Project Lead is also the administrative contact for this application.</p> <p>To add professional enabling staff you will need to click 'Add team member' in the Core Team section and:</p> <ul style="list-style-type: none"> • assign role to the team member then click continue • select the team member's organisation • provide the team member's details. This includes the team member's first name, last name, and email address.

Publications:

Information required	Mandatory?	Other details
Copy and paste the completed Stage 2 table of questions with details of the monographs, edited collections, and book chapters that your organisation is claiming funds for from UKRI in this application.	Yes	<p>A link to the Stage 2 table of questions document is provided in the information bank.</p> <p>This section has a 10,000 word-limit</p>

File upload	Yes	<p>Save invoices in a single PDF no larger than 8MB. The invoices should appear in the order in which the publications are included in the table.</p> <p>For the file name, use the unique UKRI Funding Service number the system gives you when you create an application, followed by 'your organisation name_invoices'</p> <p>Unless specifically requested, please do not include any sensitive personal data within the attachment.</p>
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Annex 2: Creating an account on the Funding Service

You will need an account on the Funding Service to complete and submit applications to UKRI.

To help you plan and prepare your Stage 2 screenshots of the process to create an account are provided below.

Select an organisation

Select an organisation

Start entering, then select, your organisation's name

This will be the lead organisation for your application. Only organisations registered with the UKRI Funding Service can apply for this Opportunity.

Continue

Confirm your organisation's name

Confirm your organisation's name

Registered organisation:
Research organisation name

Confirm

Enter your details

Enter your details

This information is used to set up an account so you can apply for funding Opportunities and to contact you when required. UKRI processes all data in accordance with current UK law. You can find out how we use personal data, and your rights as a data subject in our [privacy notice \(opens in a new tab\)](#).

First name

Last name

Email address

Create password

▶ [How to create a strong password](#)

Must be at least 12 characters

 [Show](#)

[Create account](#)

Check your email

Check your email

To verify your details, we have emailed a link to **Email address provided**. Select it to sign into your UKRI Funding Service account and start your application for 'Open access fund for longform publications: claim costs for publications (Stage 2)'. If you can't see the email in your inbox, check your junk folder.

Follow the instructions in the email.