

## PGR Finance Team Remit and Responsibilities Overview 2026

PGR Finance manages central financial activity for large training grants, the Wolfson Scholarship, and YGRS Scholarships, alongside institution-wide reporting and monitoring tasks. Single or smaller scholarship awards and day-to-day financial tasks are managed at departmental level.

Following the restructuring of the Post Graduate Research Admin (PGRA) team in late 2024, finance, reporting and monitoring tasks were transferred to the new PGR Finance team, sitting within the Internal Funding and Programmes Team (IFPT). To ensure effective institutional delivery following this transition, this document clearly defines the exact scope of the central PGR Finance team's responsibilities, as well as what falls outside its remit.

The volume and variety of training grants and scholarships across the institution is highly complex. Historical changes to central management and support have caused disruption over the years, leading to a loss of consistency and institutional knowledge. Furthermore, new UKRI terms and conditions and student database coming into effect from 2026 have introduced additional complexity. Consequently, the team is responsible for a large, varied, and often organically grown workload that sometimes sits outside the traditional scope of finance related tasks. Nevertheless, the primary focus of the team remains to provide central financial management of larger training grants.

The team operates with limited resources and as at June 2026 comprises: a Training Grants Finance and Competitions Coordinator (1 FTE), a Post Award Grant and Funds Coordinator (1 FTE fixed term until 31st March 2027) and a dedicated ESRC White Rose DTP Link Administrator (0.60 FTE). The team will also shortly be recruiting a new role to manage the upcoming EPSRC Planet Doctoral Focal Award (0.60 FTE).

The team is responsible for the following finance, reporting and monitoring related tasks:

- **Query Management:** handling relevant daily inbox queries, including complex finance issues.
- **Training Grant Setup:** setting up project codes, work orders, and internal trackers for new training grants and UKRI Disabled Students Allowance (DSA).
- **Compliance:** monitoring compliance and providing guidance on relevant training grant terms and conditions.
- **Training Grant and Year-End Reconciliation:** checking and balancing all AC work orders for the Year End, including processing accruals, prepayments, journaling UKRI funds and closing reconciled projects.
- **Audits:** coordinating and providing data for internal University of York audits.
- **Process and Guidance Documents:** creation and upkeep of internal process documents and creation on guidance documents to share with external teams to ensure consistent and efficient delivery across the institution.
- **Management Data:** development and upkeep of central management data regarding the number and types of training grants in delivery at the institution.
- **Studentship Financial Forecasts:** working with finance colleagues to ensure studentship forecasts are accurate.

UKRI funded training grant specific tasks:

- **New Training Grant Bids:** submission of new bids through The Funding Service (note we are not responsible for the preparation or checking of bids, only the submission).
- **Grant Management:** Managing acceptance and start confirmations for new training grants.
- **Large Institutional Training Grant Oversight:** financial reconciliation work and claims to funders and partner leads. The team completes the reconciliation of accounts and processes journals directly on Agresso.
- **Compliance:** monitoring compliance such as the 30% international studentship cap for EPSRC Block Grants and providing guidance on UKRI terms and conditions.
- **Disability Student Allowance (DSA) Claims:** reconciling and compiling the annual Disability Student Allowance claim.
- **UKRI Studentship Data System:** coordinating and supporting departments to ensure the upkeep of records.
- **Absence Records:** creating student journey documents for all cases and updating the UKRI Studentship Data System (SDS) to reflect absence approvals (studentship and funding end dates).
- **Leave and Stipend Cross-Checking:** Cross-checking with PGR Special Cases to monitor student leave and determine ongoing eligibility for stipend payments.
- **Leave Tracking:** reviewing short-term leave accumulation annually and calculating additional stipends owed.
- **Monitoring and Filing:** reviewing and processing Customer Account Reports (CAR), Monthly Report Packs, Additional Funding Notifications (AFN), and No Cost Extensions (NCE).
- **Monitoring Surveys:** preparing, distributing, and compiling data from departments (specifically for EPSRC DTP and ICASE training grants).
- **Audits:** coordinating and providing data for external UKRI audits.

We also manage the following for specific training grants and scholarships:

- **ESRC White Rose DTP:** competition and cohort management, processing of administration fees and six monthly cost-incurred claims to Sheffield University<sup>1</sup>.
- **Wolfson Scholarship:** competition delivery and recruitment of students and all finance related tasks.
- **AHRC Doctoral Landscape Award 2026:** competition management.
- **EPSRC Vacation Internships:** management of the financial claims for EPSRC Vacation Internships.
- **WRoCAH:** tracking student offer letters, issuing the corresponding UoY studentship offer letters, managing WRoCAH student expense claims and creation of work orders.

What we are not responsible for:

- Day to day financial tasks e.g. processing stipend payments and student expense claims. This is managed by departments (note that for Wolfson PGR Finance process the stipends and coordinate RTSG payments).

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<sup>1</sup> Note this role has dedicated resource through the ESRC White Rose DTP Link Administrator (0.60 FTE)

- Adding or removing student information on the UKRI Studentship Data System (SDS) including setting up new UKRI-funded students on the system or removing students who have left.
- Studentship invoicing for partner institution costs.
- Preparation work required for the submission of new training grants bids.
- York Graduate Research School (YGRS) Conference Fund management (completed by YGRS).

What we are not responsible for (ESRC WR DTP Only):

- Updating SITS/SDS (completed by the department or Student Records).
- Student Journeys (completed by the department and PGR Finance).
- Onboarding for placements (placement hosts - which if UoY in rare circumstances, the department admin role will need to assist with this).