

**Finance Approval Guidance – All Approvals**

**Contents**

- 1. Accessing the approval Request ..... 2**
- 2. Request is in Plan ..... 2**
  - 2.1 Core funded ..... 3*
  - 2.2 Research Grant ..... 3*
- 3. Request is New to Plan ..... 3**
  - 3.1 Core Funded ..... 4*
  - 3.2 Research Grant..... 4*
- 4. Approval ..... 5**

## 1. Accessing the approval Request

Once HR (and where applicable, Research Finance) have reviewed and approved the request, it will progress to Finance for approval.

You will receive an email like the one below:

Please click on the following link to view the details of the request and to make your decision.  
[https://eur03-safelinks.protection.outlook.com/?url=https%3A%2F%2Fleeds.stonefish.co.uk%2FVFR%2FRequest.aspx%3Frequestid%3D661&data=05%7C01%7CC\\_Baillif%40leeds.ac.uk%7Cafc8d571b14740d3485c08da38d3bb1e%7Cbdeaeda8c81d45ce863e5232a535b7cb%7C1%7C0%7C637884779263568606%7CUnknown%7CTWFpbGZsb3d8eyJWijoiMC4wLjAwMDAilCjQljoiv2luMzRlCjBTi6lk1haWwvLjCjXVCI6Mn0%3D%7C3000%7C%7C%7C&data=GgKWKppFyczTlvckmHHqg3ET6EY353XR2qAOF7YUztw%3D&reserved=0](https://eur03-safelinks.protection.outlook.com/?url=https%3A%2F%2Fleeds.stonefish.co.uk%2FVFR%2FRequest.aspx%3Frequestid%3D661&data=05%7C01%7CC_Baillif%40leeds.ac.uk%7Cafc8d571b14740d3485c08da38d3bb1e%7Cbdeaeda8c81d45ce863e5232a535b7cb%7C1%7C0%7C637884779263568606%7CUnknown%7CTWFpbGZsb3d8eyJWijoiMC4wLjAwMDAilCjQljoiv2luMzRlCjBTi6lk1haWwvLjCjXVCI6Mn0%3D%7C3000%7C%7C%7C&data=GgKWKppFyczTlvckmHHqg3ET6EY353XR2qAOF7YUztw%3D&reserved=0)

Human Resources  
University of Leeds

By clicking on the link contained in the email, you will be taken straight to the progress tab of the staff request.

Please approve or reject the request.

Messaging Save Withdraw Approve Reject

Progress Request Details Notes All Documents

Stage Name	Result	Date
Request Submitted	Submitted	12/01/2023 17:44
HR Approval	Approved	23/01/2023 10:16
Research Finance Approval	Approved	23/01/2023 14:02
Finance Approval	Awaiting Decision	<a href="#">Send Message</a>

<< Previous Next >> All | Current | None Save

You will be able to see that there is an approval pending. To open up the form, click **Next**.

**NOTE:** when you click **next** the whole form will appear, and you will be able to review the details but not edit. Scroll to the bottom of the form to the Financial Details section.

## 2. Request is in Plan

Financial Details

The post is In Plan

Funding Method:

Funding HESA Code:

Salary Account Code:

Supporting Documents:

<< Previous Next >>

If the **post is in plan**, select the Funding Method from the drop down menu.

## 2.1 Core funded

The screenshot shows the 'Financial Details' section of a form. At the top, it says 'The post is In Plan'. Below this, there are three fields: 'Funding Method:' with a dropdown menu set to 'Core', 'Funding HESA Code:' with an empty dropdown menu, and 'Salary Account Code:' with an empty text input field. At the bottom left, there are two buttons: '<< Previous' and 'Next >>'. Blue arrows point from the text on the right to the 'Core' dropdown, the 'Funding HESA Code' dropdown, and the 'Salary Account Code' input field.

If you select **Core, Other restricted, Knowledge Transfer, Development or Endowment** as the funding method, you then need to select the Funding HESA code from the drop down box. If you're unsure, this can be changed at a later date.

Then enter the salary account code.

## 2.2 Research Grant

The screenshot shows the 'Financial Details' section of a form. At the top, it says 'The post is In Plan'. Below this, there are four fields: 'Funding Method:' with a dropdown menu set to 'Research Grant', 'Research Finance Manager:' with a dropdown menu set to 'Select finance manager', 'Funding HESA Code:' with an empty dropdown menu, and 'Salary Account Code:' with an empty text input field. At the bottom left, there are two buttons: '<< Previous' and 'Next >>'. Blue arrows point from the text on the right to the 'Research Grant' dropdown, the 'Research Finance Manager' dropdown, the 'Funding HESA Code' dropdown, and the 'Salary Account Code' input field.

Click **Next** to progress the form.

If you select '**Research Grant**' or '**Mixed Funded**' as the funding method, you then need to select the 'Research Finance manager' from the drop down menu.

Then select the Funding HESA code from the drop down options. If you're unsure, this can be changed at a later date.

Then enter the salary account code; if this it to split across more than one code please enter 0 at this stage

## 3. Request is New to Plan

The screenshot shows the 'Financial Details' section of a form. At the top, it says 'This request is New to Plan'. Below this, there are four fields: 'Financial Pressure Accepted:' with radio buttons for 'Yes' and 'No', 'Funding Method:' with an empty dropdown menu, 'Funding HESA Code:' with an empty dropdown menu, and 'Salary Account Code:' with an empty text input field. Blue arrows point from the text on the right to the 'No' radio button and the 'Funding Method' dropdown.

If request or role is new to plan, can financial pressure be accepted? If not, reject request and send back to Recruiting Manager.

The screenshot shows the 'Financial Details' section of a form. At the top, it says 'This request is New to Plan'. Below this, there are four fields: 'Financial Pressure Accepted:' with radio buttons for 'Yes' and 'No', where 'No' is selected. Below the radio buttons, there is a red error message: 'Please reject this request and give details for the rejection \*'. Below this, there are three fields: 'Funding Method:' with an empty dropdown menu, 'Funding HESA Code:' with an empty dropdown menu, and 'Salary Account Code:' with an empty text input field. Blue arrows point from the text on the right to the 'No' radio button and the 'Funding Method' dropdown.

If the financial pressure is accepted, select **Yes** and then enter the Funding details.

The screenshot shows the 'Financial Details' section of a form. At the top, it says 'This request is New to Plan'. Below this, there are four fields: 'Financial Pressure Accepted:' with radio buttons for 'Yes' and 'No', where 'Yes' is selected. Below the radio buttons, there is a text input field labeled 'How will the post be funded:'. Below this, there are three fields: 'Funding Method:' with an empty dropdown menu, 'Funding HESA Code:' with an empty dropdown menu, and 'Salary Account Code:' with an empty text input field. Blue arrows point from the text on the right to the 'Yes' radio button and the 'How will the post be funded:' text input field.

**Financial Details**

The post is New to Plan

Financial Pressure Accepted:  Yes  No

Funding: How will the post be funded:  
The post will be funded by the core Budget

Funding Method:

Funding HESA Code:

Salary Account Code:

Supporting Documents:

<< Previous    Next >>

Select the **funding method** from the drop down menu.

### 3.1 Core Funded

HR Approval: 01 - Wholly general institution financed  
Request Type Appropriate: 02 - Partly (but principally) financed by the institut  
UEG-lead Approval Required: 03 - NHS / General Medical or Dental Practice or Dept o  
DVC Sign Off Required: 07 - UK central government bodies and local authoritie  
08 - UK industry, commerce and public coporations  
09 - EU government bodies  
10 - EU other  
11 - EU other

**Financial Details**

Financial Pressure Accepted: 12 - Other overseas sources  
15 - Other sources

Funding: 51 - Biotechnology and bio sciences research council (B  
52 - Medical Research Council (MRC)  
53 - Natural Environmental Research Council (NERC)  
54 - Engineering & Physical Sciences Research Council  
55 - Economic & Social Research Council (ESRC)  
57 - Arts & Humanities Research Council (AHRC)  
58 - Science & Technology Facilities Council (STFC)  
59 - Research council - not specified  
63 - Cancer Research UK  
64 - Wellcome Trust  
65 - Other Associations of Medical Research Charities (

Funding Method:

Funding HESA Code:

Salary Account Code:

If you select **Core, Other restricted, Knowledge Transfer, Development or Endowment** as the funding method, you then need to select the Funding HESA code from the drop down menu. If you're unsure, this can be changed at a later date.

Then enter the salary account code.

Funding Method:

Research Finance Manager:

Funding HESA Code:

Salary Account Code:

<< Previous    **Next >>**    Save

Click **Next** to progress the form

### 3.2 Research Grant

**Financial Details**

This request is New to Plan

Financial Pressure Accepted:  Yes  No

Funding: How will the post be funded:  
The post will be funded by using a Research Grant

Funding Method:

Research Finance Manager:

Funding HESA Code:

Salary Account Code:

If you select '**Research Grant**' or '**Mixed funded**' you will then need to enter a 'Research Finance Manager' options will appear in the drop down menu.

Request Type Appropriate:  
 UEG-lead Approval Required:  
 DVC Sign Off Required:  
 Financial Details:  
 Financial Pressure Accepted:  
 Funding:  
 Funding Method:  
 Research Finance Manager:  
 Funding HESA Code:  
 Salary Account Code: 12345

01 - Wholly general institution financed  
 02 - Partly (but principally) financed by the Institut  
 03 - NHS / General Medical or Dental Practice or Dept o  
 07 - UK central government bodies and local authoritie  
 08 - UK industry, commerce and public corporations  
 10 - EU government bodies  
 11 - EU other  
 12 - Other overseas sources  
 15 - Other sources  
 51 - Biotechnology and bio sciences research council (B  
 52 - Medical Research Council (MRC)  
 53 - Natural Environmental Research Council (NERC)  
 54 - Engineering & Physical Sciences Research Council  
 55 - Economic & Social Research Council (ESRC)  
 57 - Arts & Humanities Research Council (AHRC)  
 58 - Science & Technology Facilities Council (STFC)  
 59 - Research council - not specified  
 63 - Cancer Research UK  
 64 - Wellcome Trust  
 63 - Cancer Research UK

<< Previous Next >> Save

Select the correct **Funding HESA Code** from the drop down menu. If you're unsure, this can be changed at a later date.

Then enter the **Salary Account Code**.

Click **Next** to progress the form

#### 4. Approval

##### 0104-22 - Joe Bloggs, Lecturer - Act Up/Additional Responsibilities

Please approve or reject the request.

Messaging Save Withdraw Approve Reject

Progress Request Details Notes

Notes

Save Notes Cancel Changes

<< Previous Next >> Save

The **Notes** section will appear. Here you can note why the form is being rejected or any other detail you would like to record.

You can approve or reject the form by clicking on the tabs at the top.

**NOTE:** if you reject the form it will be sent back to the Hiring Manager to review the notes and re-submit the form.

**If the form is approved it will be sent on to the next stage of approval.**