

TURING



HM Government

SCHEME

The UK's global programme
to study and work abroad

The Turing Scheme
Beneficiary Portal User Guide

Version 1 | July 2022

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Introduction

This guide has been produced to help organisations use the Turing 2021/22 Beneficiary Portal for accessing and uploading information related to their 2021/22 Grant Agreement. This covers accessing current information on their agreement, uploading of payment requests and other information, and completion of the Final Report upon completion of all mobilities.

Prior to accessing the Portal, each designated contact will receive an invitation code, via email, which will trigger the process to be able to sign up for an account. Designated contacts are those who are listed on our system as the lead contacts within organisations participating in the Turing Scheme. The instructions for signing up for an account are contained in the PDF attachment which is sent with the invitation email and will, therefore, not be covered in this user guide.

Accessing the Turing 2021/22 Beneficiary Portal

The portal can be accessed at <https://turingscheme.powerappsportals.com>. Once you open the portal, the “Welcome to the Turing Scheme 2021/22 Portal” page will be displayed. This will offer the options to go to the Home Page (the Welcome Page), display the Accessibility Statement or Sign-In. shown in the menu at the top right-hand side of the page.

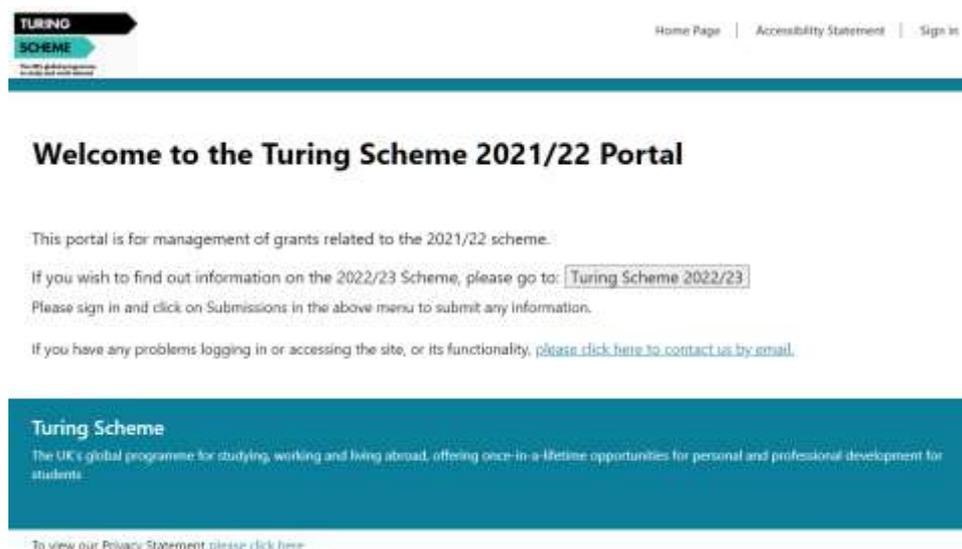


Figure 1 The Turing 2021/22 Portal Welcome Screen

Select the “Sign in” button on the top right-hand side.



Figure 2 The Sign-In Button

Then select the blue button to “Please sign in with your registered email address”



Figure 3 Select the "Please sign in" button

Finally, enter the email and password you used when registering.

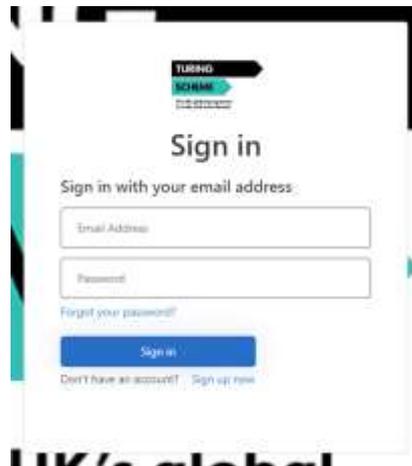


Figure 4 Enter your registered email and password

Main menu

The main menu is always displayed across the top of the screen and contains several options. Once you are signed in to the Portal, you will see additional menu items.



Figure 5 Additional menu items for logged in user

These menu items are described in more detail in the following sections and cover:

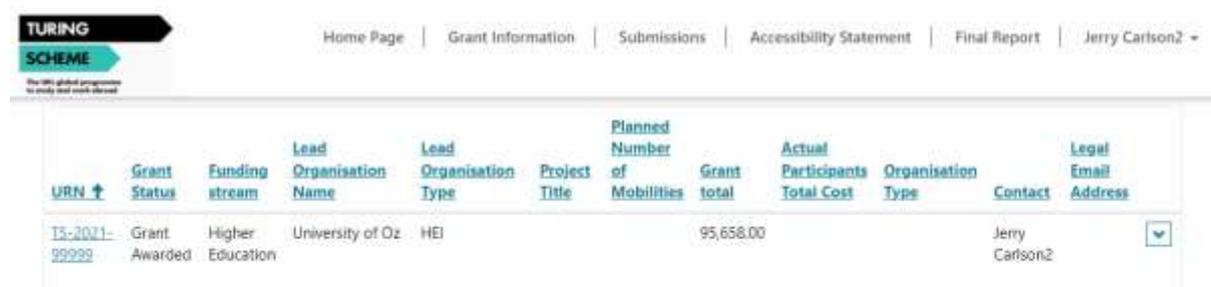
- **Grant information:** This provides access to financial, mobility and participant information of any grants where you are the main contact.
- **Submissions:** This allows you to enter summary report information and to upload payment request spreadsheets, PDF and JPG documents (e.g. for providing expense receipts) and Microsoft Word documents (e.g. to provide additional information or detailed reports).
- **Final report:** This presents a series of questions which must be completed once all mobilities have been completed and is used to trigger any final payments.

Note also that your name should be displayed in the top right-hand side of the menu (where “Sign in” previously appeared).

Grant information

The Grant Information page displays a list of any grants for which you are listed as the main contact. This list displays key information such as:

- The Unique Reference Number (URN) of the grant
- The status of the grant
- The funding stream (e.g. School, Higher Education)
- The organisation name
- The organisation type (e.g. School or HEI)
- The total grant awarded
- The total cost of any participants already reported
- The main contact name
- The legal contact email address



The screenshot shows the TURING SCHEME website interface. At the top, there is a navigation menu with links for Home Page, Grant Information, Submissions, Accessibility Statement, Final Report, and a user profile for Jerry Carlson2. Below the navigation is a table listing grants. The table has columns for URN, Grant Status, Funding stream, Lead Organisation Name, Lead Organisation Type, Project Title, Planned Number of Mobilities, Grant total, Actual Participants Total Cost, Organisation Type, Contact, and Legal Email Address. A single grant is listed with the URN IS-2021-99999, Grant Status Awarded, Funding stream Higher Education, Lead Organisation Name University of Oz, Lead Organisation Type HEI, Grant total 95,658.00, and Contact Jerry Carlson2.

URN ↑	Grant Status	Funding stream	Lead Organisation Name	Lead Organisation Type	Project Title	Planned Number of Mobilities	Grant total	Actual Participants Total Cost	Organisation Type	Contact	Legal Email Address
IS-2021-99999	Grant Awarded	Higher Education	University of Oz	HEI			95,658.00			Jerry Carlson2	

Figure 6 List of grants

Click on “Please click here to go back” to return to the previous screen or select the “Home Page” option in the menu to return to the welcome page.

Submissions

The Submissions section allows you to submit a summary report or to upload files, such as payment requests, proof of expenditure and detailed reports.

Once you enter this section you will see a history of all previous submissions. Note, however, that once a submission is completed, it cannot be changed, and the uploaded documents cannot be downloaded again. Therefore, please only submit your details once these are complete.

Submissions history

Submissions History + Create

Submission Reference	Created On	Turing Grant	Contact	Payment Request	Payment Due Date	Transferred to Turing	Monthly Summary
1050	10-Jun-22 3:31 PM		Jerry Carlson2	No		No	
1051	16-Jun-22 11:01 AM	TS-2021-	Jerry Carlson2	No		No	Our January trips were cancelled due to illness. These have been rescheduled until May.
1052	16-Jun-22 11:51 AM	TS-2021-	Jerry Carlson2	No		No	There are no further trips planned until next year. Our final report will be submitted in early July.
1053	20-Jun-22 10:22 AM	TS-2021-	Jerry Carlson2	No		No	Completed Madrid trip. 10 learners attended.

Figure 9 Summary of previous submissions

Further detail can be displayed on each submission by clicking the relevant Submission Reference or by clicking on the down arrow on the right-hand side and selecting “View details”.

TURING SCHOLAR Home Page | Grant Information | Submissions | Accessibility Statement | Final Report | Jerry Carlson2

Submission Reference 1054

Contact Jerry Carlson2

Turing Grant TS-2021-88998

Monthly Summary (update on activities)
Application for Turing 2022/23 has been submitted.

Figure 10 View previous submission

By scrolling down, you are also able to see any documents which were attached to that submission.

Payment Request		
<input type="radio"/> No <input type="radio"/> Yes		
Transferred to Turing		
<input type="radio"/> No <input type="radio"/> Yes		
Attachments		
File Name	File Size (Bytes)	Created On
Payment Request Template - Final - V1.5.xlsx	291095	:04-Jul-22 7:07 PM

[Please click here to go back to list](#)

Figure 11 Previous submission file attachments

Clicking on “Please click here to go back to list” or the browser back button will take you to the Submissions section again.

Creating a submission

1. To create a new submission, click on the “Create” button at the right-hand side of the list of previous submissions.

Submissions History

Submission Reference	Created On	Turing Grant	Contact	Payment Request	Payment Due Date	Transferred to Turing	Monthly Summary
1050	10-Jun-20		larru	N/A		N/A	

[Create](#)

Figure 12 Creating a new submission

This will display the form for completing a new submission with step 1 Submission Completion shown in blue at the top of the form. **Note that you cannot click on the tabs to proceed to the next stage, but you need to step through each part of the form** (e.g. to move to step 2 to upload payment requests).



[Home Page](#) | [Grant Information](#) | [Submissions](#) | [Accessibility Statement](#) | [Final Report](#) | Jerry Carlson2 ▾

1 Submission Completion
2 Upload any payment requests
3 Upload any supporting documents
4 Upload Reports or Change Requests

Please click on magnifying glass to select your grant

Select your grant

Q

Monthly Summary (update on activities)

Figure 13 New submission form

- Click on the magnifying glass to the right of “Select your grant” and tick the relevant grant line that you are making a submission for, then click on “Select”. If you are only responsible for one grant, this will already be ticked.

Figure 14 Selecting your grant

If you are not the main contact for your grant then you will not see any grants listed. You should select “Cancel” and proceed with the remaining steps.

- Complete the “Monthly Summary (update on activities)” section of the form with any relevant information you wish to include. This may be a brief update on activities completed or a short explanation of the purpose for the submission (e.g. “Providing expenditure proof for exceptional travel”).

Figure 15 Complete the monthly summary

- Scroll down and select whether this is a payment request. The back-office team use this to identify which submissions have payment requests attached to ensure these are processed to meet the payment timetable.

Payment Request

No Yes

Submit

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Figure 16 Indicating whether this is a payment request

- Click on the “Submit” button. This will not fully submit the form but will create a new submission and move you to the next stage to allow you to attach files.
- You now have the option to attach a payment request file. This only accepts Excel files and you should use the provided Turing Scheme template. Select “Choose files” to pick the file you wish to attach. This will bring up a dialog box where you can go to the folder where you have saved the file, click on the filename and then click on “Open”.

TURING SCHEME

Home Page | Grant Information | Submissions | Accessibility Statement | Final Report | Jerry Connor2

1. Submission Completion ✓ 2. Upload any payment requests 3. Upload any supporting documents 4. Upload Reports or Change Requests

File Submission

Please upload any Payment Request files on this page (use the next page for supporting documents)

Choose Files No file chosen

Previous Next

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Figure 17 Attaching a payment request file

- Once you have selected the file, its name will be partially shown.

1. Submission Completion ✓ 2. Upload any payment requests 3. Upload any supporting documents 4. Upload Reports or Change Requests

File Submission

Please upload any Payment Request files on this page (use the next page for supporting documents)

Choose Files Payment Re.J - V1.xlsx

Previous Next

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Figure 18 File selected

- Click on “Next” to go to step 3 to upload supporting documents.

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Figure 19 Uploading supporting documents

- Repeat the steps above to attach any supporting documents. Note that the system will only allow you to upload JPG (images, such as scanned receipts) and PDF documents. Then click on “Next” to go to the final step for uploading Reports or Change Requests.
- On the final step, you can upload Word documents for detailed reports or change requests. Repeat the steps above to attach any relevant documents.
- When you are ready, click on “Submit”. This will finalise your submission. You will not be able to change the details after you submit, so please check carefully before clicking on the button.

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Figure 20 The final submit step

- Once you submit, this will be shown at the bottom of the list with the date and time of submission. You may click on the reference to view the submission, together with details of any files attached.

1055	04-Jul-22 7:31 PM	TS-2021- 99999	Jerry Carlson2	No	No	Providing proof of expenditure for exceptional travel costs.	
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Figure 21 Details of new submission

Final report

Note: Please ensure your participant data is correct and/or has been uploaded in the submission section of the portal along with any receipts for exceptional expenditure before filling out the final report questions.

This section is used to submit your final report once all your mobilities are complete.

This also triggers the final payment process for the end of scheme reconciliation.

This form should be completed by your main contact, as you are required to select your grant when you complete the form, or you can enter the URN for your grant in the relevant box.

Once in this section, to submit a final report, click on the “Create” button at the top right-hand side of the list.

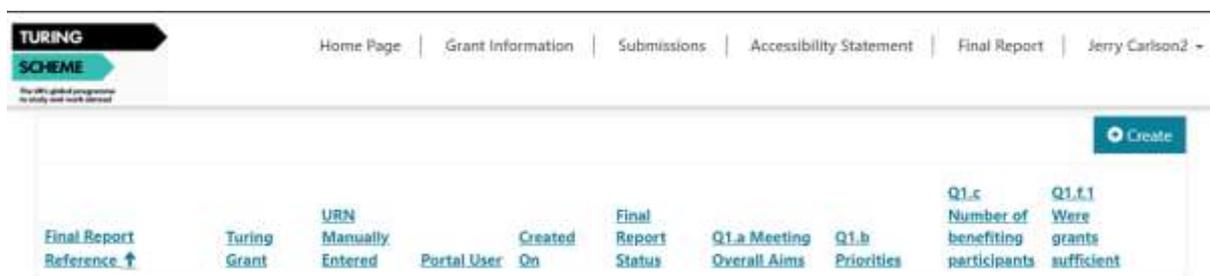


Figure 22 Final Report Section

This will display a form which you need to complete. Items with an asterisk (*) are mandatory.

Figure 23 Final Report Form

You will not be able to submit the form until all mandatory items are completed. If there are items to be completed, you will receive an error.

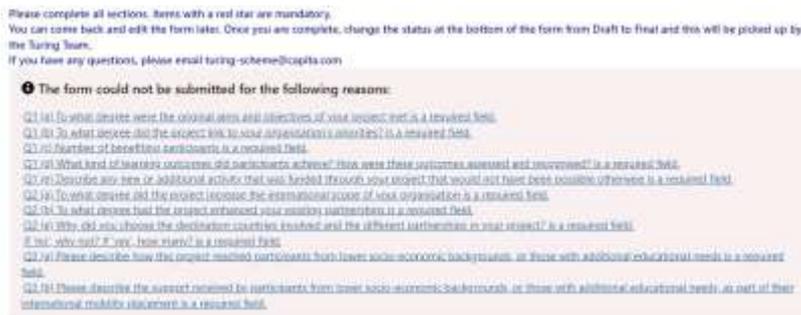


Figure 24 Errors for non-completion of mandatory fields

The form is a mixture of drop-down values and text boxes. General guidance for text boxes is that they should be no more than 150 words.

Note that for this form, you can come back and edit the form later, so it does not have to be completed in one session (e.g. if you need to get more information). If you wish to edit the form later (or you have not completed the form), submit the form but leave the status as “Draft”. It will be necessary to put some placeholder text (“To be completed”) in mandatory boxes to allow you to submit.



Figure 25 Leave the status at draft until you have completed the form

You can edit the form by going into the Final Report section and selecting the down arrow to the right of your report and selecting Edit.



Figure 26 Selecting a report to edit

Once you have completed the form, change the status to “Final” and submit.



Once you have completed this report, please set the status to Final. *

Final

Submit

Figure 27 Submitting the final report

Signing out

When you are finished reviewing the information, click on the dropdown arrow to the right hand side of your name and select “**Sign Out**”.

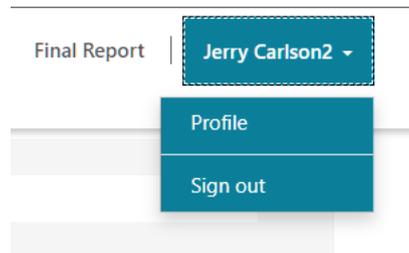


Figure 28 Signing Out

Further help and advice

If you have a query that cannot be resolved by the published guidance or content on the website, you can get in touch with us by e-mail:

Turing-scheme@capita.com