



UK Research
and Innovation

Global Talent Visa Application G6.1.A

UKRI Funding Services
Grant Support & Set Up: Other
Standard Operating Procedures

Global Talent Visa Application

G6.1.A

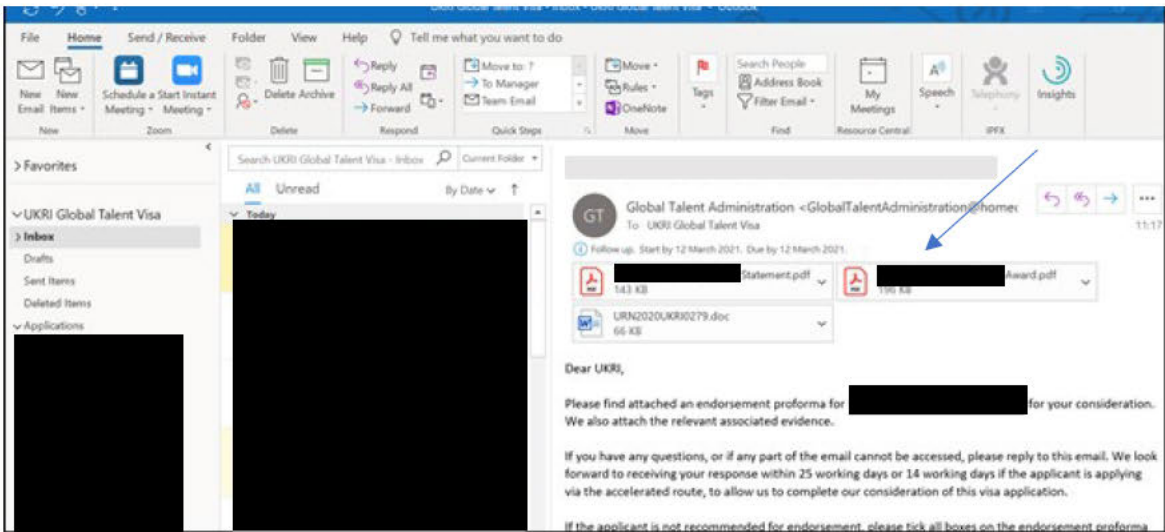
Background

A Global Talent Visa application has been submitted to the Home Office. The Home Office have emailed the applicants documents for UKRI to verify and check the applicant's eligibility.

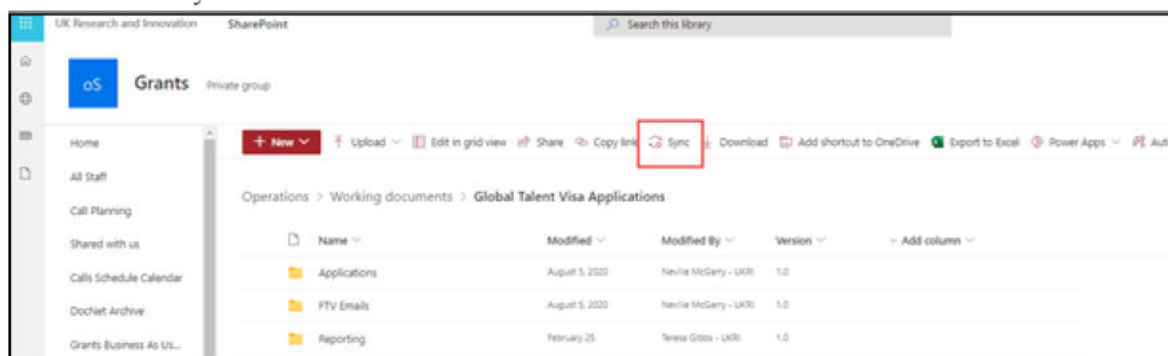
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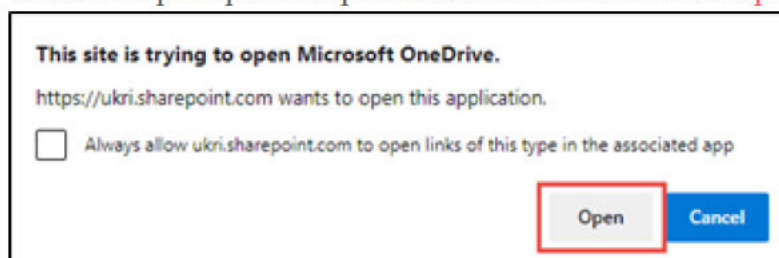
Detailed Process Guide

1	Trigger Point An email is received from The Home Office asking UKRI to verify an application for a Global Talent Visa.
2	Request to verify an application for a Global Talent Visa Open the Statement of Guarantee, Application form, Award letter and Home office letter provided by the Home Office – these should be attached to the email.  From OneDrive Grants - Global Talent Visa Applications - All Documents (sharepoint.com) open the SOP folder and open the Excel file called 'UKRI Tier 1 Tracker'. Make a note on the UKRI Tier 1 Tracker of the Unique Reference Number (URN) provided in the Home Office Cover Sheet.
3	Decision Point - URN number on subject line is unique and matches Home Office Cover Sheet – Go to Step 5 - URN number on subject is not unique and/or does not match Home Officer Cover Sheet – Go to Next Step
4	URN number Discrepancy If the URN is different on the email and the cover sheet, return email to the Home Office for confirmation.
5	Create a new file for the application in SharePoint Open the 'Global Talent Visa Application' Folder in SharePoint. Grants - Global Talent Visa Applications - All Documents (sharepoint.com)

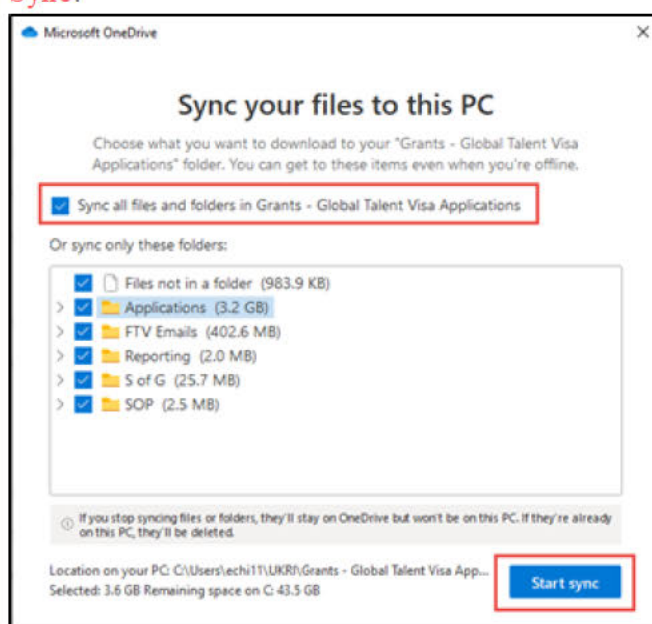
Tip: If this is the first time completing the process, click on **Sync** to synchronise SharePoint to your OneDrive.



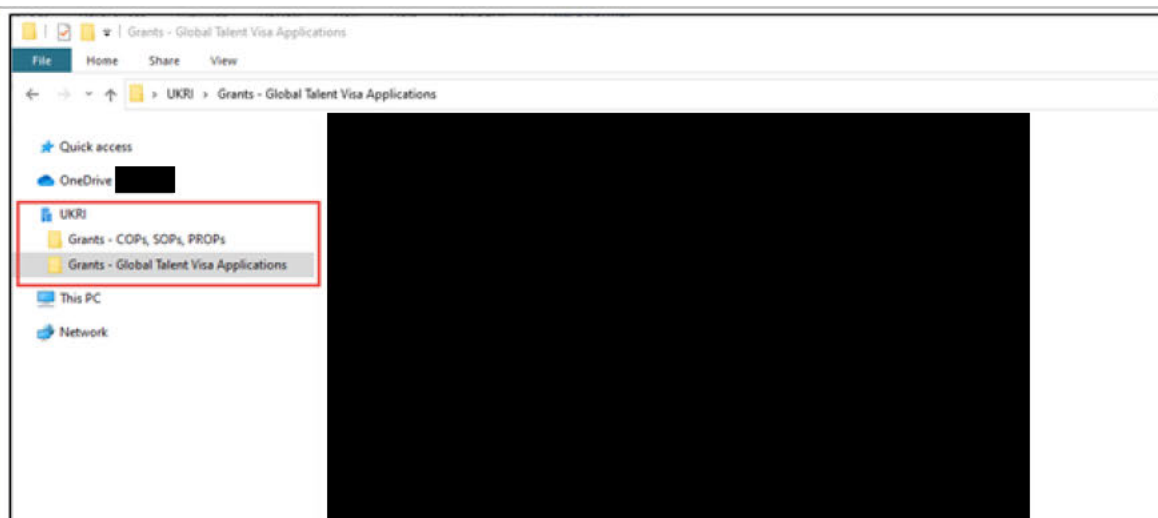
- 6 You will be prompted to open Microsoft OneDrive. Click **Open**.



- 7 You will be asked which Files you wish to Sync to your OneDrive, ensure the 'Sync all files and folders in Grants – Global Talent Visa Applications' is selected. Click **Start Sync**.

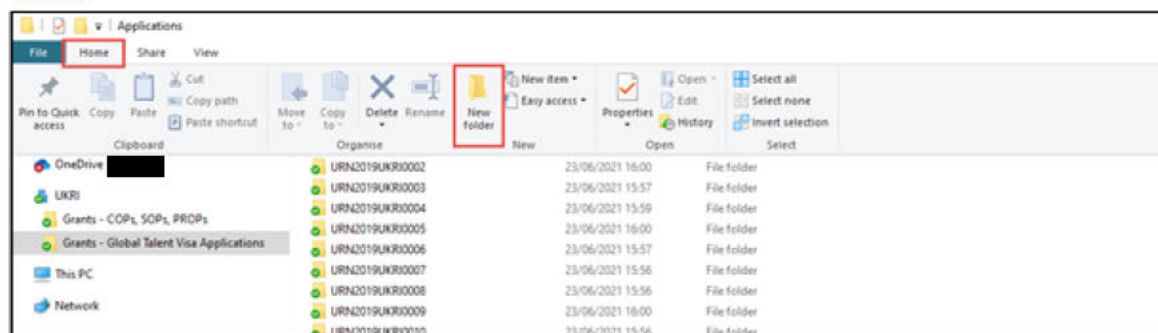


- 8 A File Explorer view will open with all documents and folders from the 'Global Talent Visa Applications' folder held on SharePoint.



- 9 Open the Applications folder and create a **New Folder**.

The Folder name should be the applicants URN provided in the Home Office Cover Sheet.

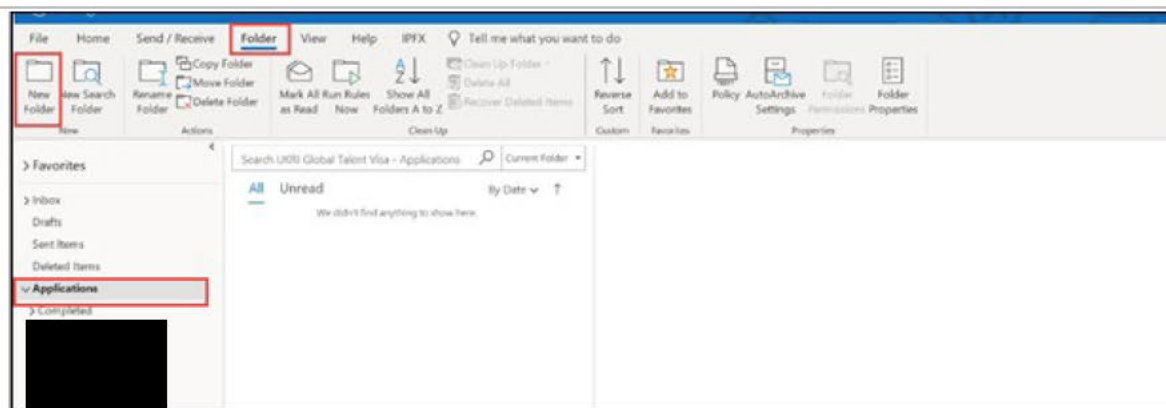


- 10 Create a new file for the application in Outlook

From the Global Talent Visa's mailbox select **Folder** in the top ribbon and create a **New Folder**.

The folder should be saved within the **Applications** folder in Outlook.

The Folder name should be the applicants URN provided in the Home Office Cover Sheet.



11 Check the attachments

Open the email and check the following mandatory attachments have been provided:

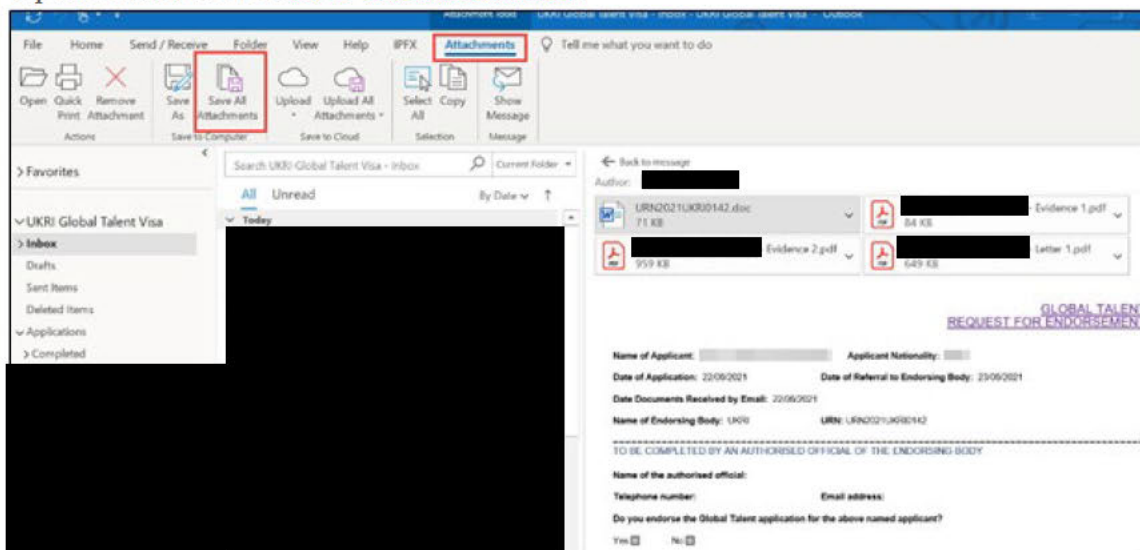
- Home Office Cover Sheet
- Grant Award Letter
- Application form
- Statement of Guarantee from the Organisation

12 Save Email and Attachments to OneDrive

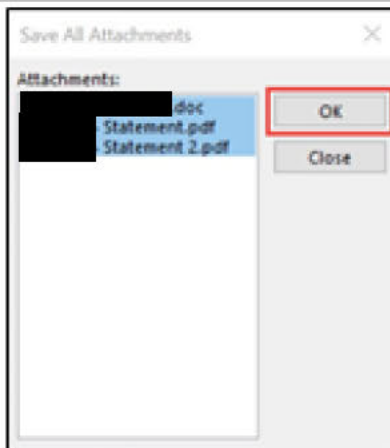
Firstly, copy the email into the OneDrive folder, select the email you want to copy. Right click and select Copy.

13 Navigate to the folder with the correct URN number in the Applications folder in OneDrive. Right Click and select Paste.

14 To add the email attachments, select one of the attachments. Select **Attachments** in the top ribbon and select **Save All Attachments**.

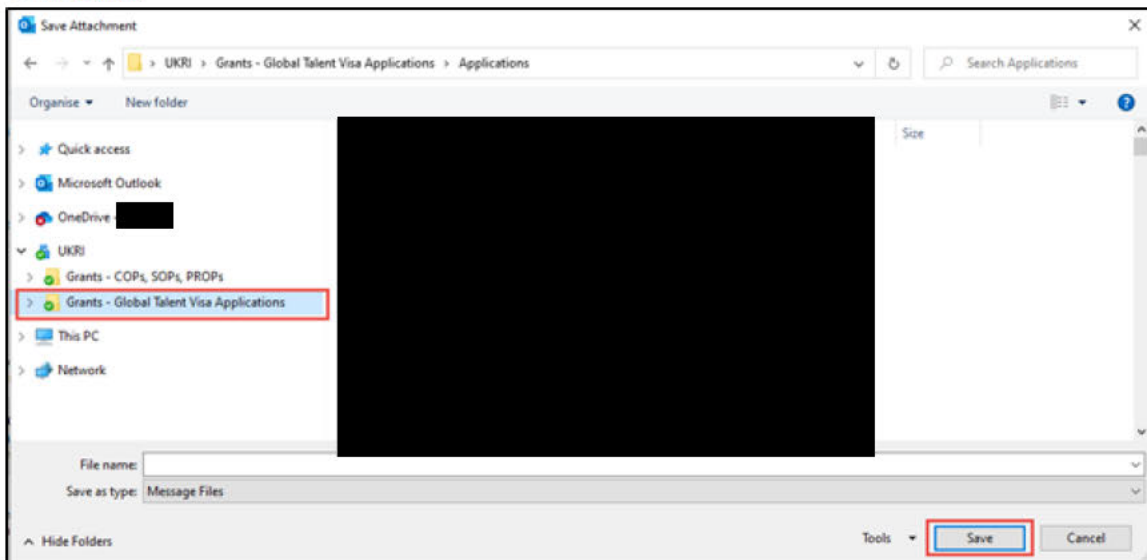


15 A pop-up box will appear with the list of attachments from the email, select **OK**.



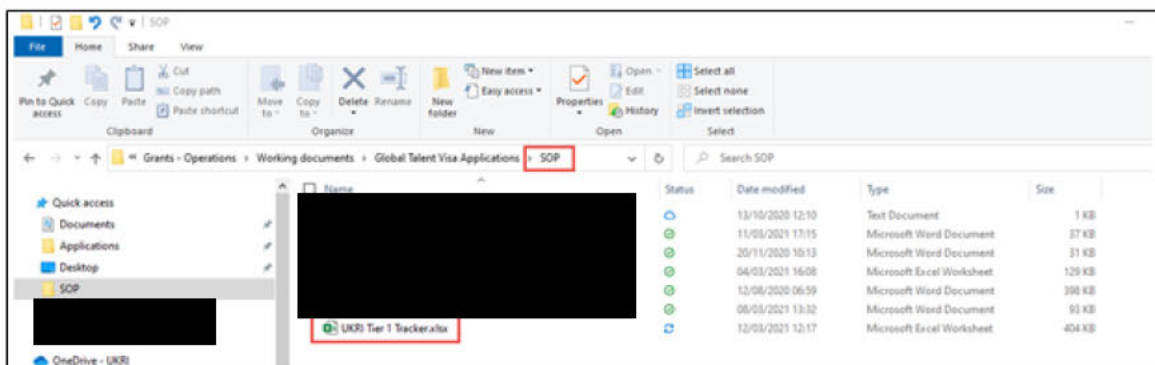
- 16 The Document Library window will open up, locate the folder with the correct URN number in the Applications folder in OneDrive.

Click **Save**.



- 17 Update the UKRI Tier 1 Tracker

From OneDrive [Grants - Global Talent Visa Applications - All](#) (sharepoint.com) open the SOP folder and open the Excel file called 'UKRI Tier 1 Tracker'.



- Check <https://www.ukcdr.org.uk/covid-circle/covid-19-research-project-tracker/>
Or <https://www.ukri.org/find-covid-19-research-and-innovation-supported-by-ukri/>
- EF1 – EF8 concessions:
 - If they meet condition EF1 – set to Yes, if failed set to No
 - If they meet condition EF2– set to Yes, if failed set to No
 - If they meet condition EF3– set to Yes, if failed set to No
 - If they meet condition EF4– set to Yes, if failed set to No
 - If they meet condition EF5– set to Yes, if failed set to No
 - If they meet condition EF6– set to Yes, if failed set to No
 - If they meet condition EF7– set to Yes, if failed set to No
 - If they meet condition EF8– set to Yes, if failed set to No
- SOG Received in advance – Yes/ No
- Date confirmation requested
- Date confirmation check made
- Name of person who confirmed Statement of Guarantee
- Position of person who confirmed - When checking the role of an applicant, if the role on the award has been used for a previous endorsement the employer/host must confirm the status of the previous applicant. If the previous applicant did not take up the job offer, then the endorsement must be withdrawn.
- Confirming telephone
- Confirming email address
- Endored - Copy the Field above for Decision and Category as they are formulas. Set the Decision field to 'Pending'
- Application Category– this is a rating of 1-4 depending on the complexity of the application (1 simple / 4 complex)
- Name of Administrator
- On hold pending question date – Using the date application received.
- SRO to Sign Off Application Decision – Enter the name Reviewer 2 who will sign off the endorsement

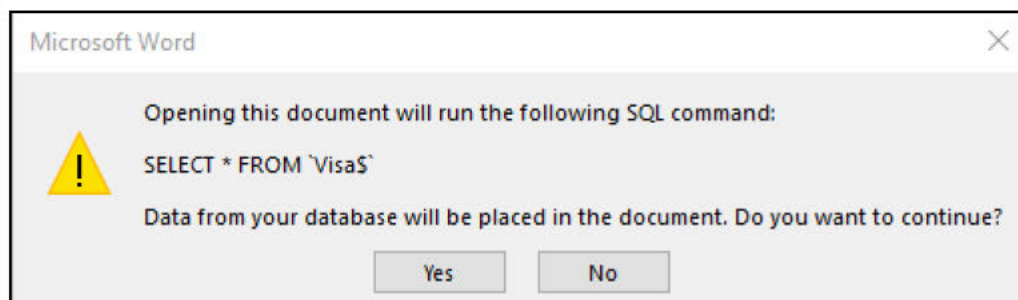
Note: If an exception is requested e.g. the applicant is an academic, it will state this on the Statement of Guarantee and should be entered onto the Tracker. This information will then feed into the Endorsement Decision letter.

19 Once all the information has been put into the tracker, Save and Close the Tracker.

20 UKRI Tier 1 Checklist Template

In OneDrive open the Word Document in the SOP Folder called UKRI Tier 1 Checklist Template.

The following message will appear, select **Yes**.

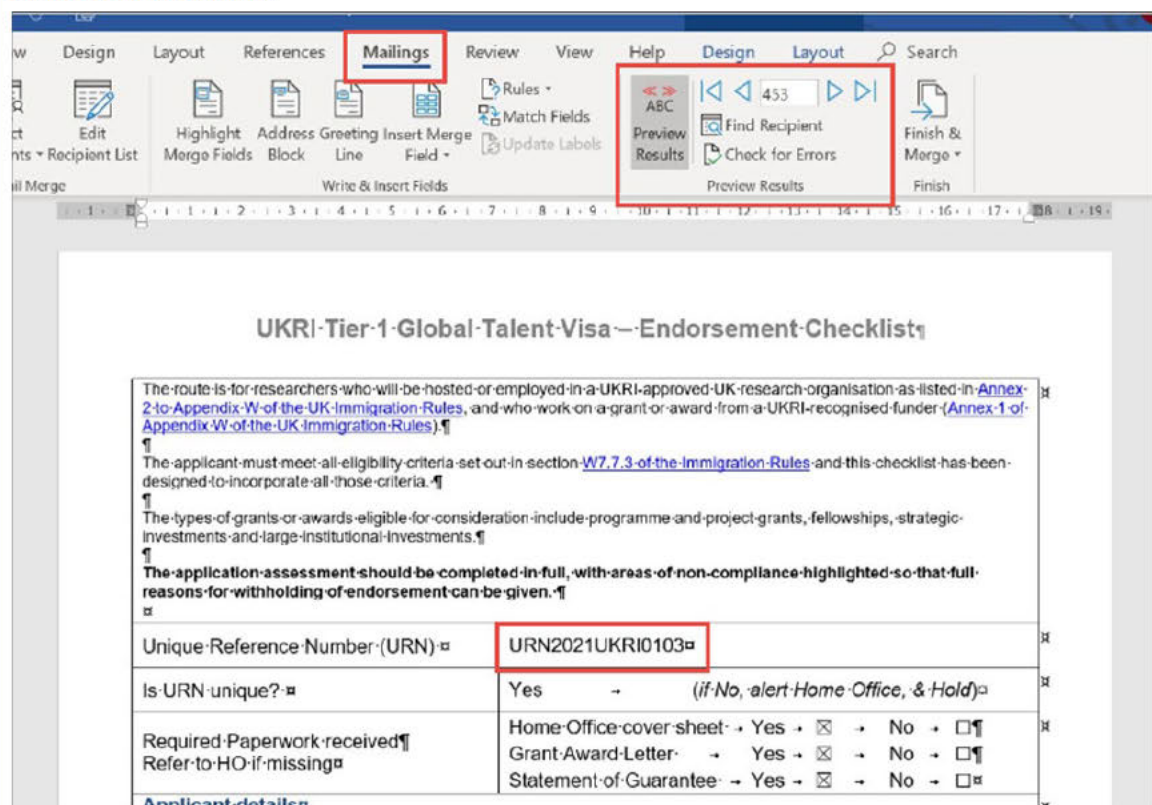


Click on the UKRI tier 1 tracker in GTV SOP folder.

Note: This message appears as the document is using the mail merge facility from the Excel Database from the UKRI Tier 1 tracker.

- 21 Click on the **Mailings** tab in the top ribbon.

Use the **Preview Results** function to scroll and find the correct Unique Reference Number and details.



- 22 Save a copy of the Checklist in the applicant's URN folder and break the links to the tracker.

To break the links, select:

- Mailings

- Start Mail Merge
- Normal Word Document
- Click Save

- 23 Rename the UKRI Tier 1 Checklist template adding the URN provided by the Home Office at the beginning of the file name and the date at the end.

 URN UKRI Tier 1 Checklist

- 24 Review the application and if there are any errors, liaise with the Operations Support Manager and then contact the 'HR Contact' as detailed in the Tracker Database and Checklist to request any missing information and to confirm that the Statement of Guarantee has been raised by the Employer/Host.

Any additional email correspondence must be copied into the Application folder in both OneDrive and Outlook.

- 25 Move all emails into the Outlook URN Folder.

- 26 Update the UKRI Tier 1 Tracker spreadsheet and checklist with the decision.

Recommendation and Approvals		
Administrator Recommendation:	UKRI Tier 1 endorsement Approve → ☒ Or Reject → ☐	
Administrator (name):		
Give reasons for Rejection		Date: 12/04/2021
First Approval		
Approver (name):		
Give reasons for Rejection		Date: 12/04/2021
Second Approval		

- 27 Update the 'Completed by Administrator Passed to Reviewer 1' field on the Tracker Database with today's date.

AZ	BA	
Completed by Administrator Passed to Reviewer 1	Completed by Reviewer 1 Passed to Reviewer 2	C P Q
29/03/2021	29/03/2021	29
29/03/2021	29/03/2021	29
12/04/2021	12/04/2021	29
31/03/2021	31/03/2021	30
		30
07/04/2021	07/04/2021	31

28 Operations Support Manager – Actions

An application is ready for review when the Completed by Administrator Passed to Reviewer 1 column in the Tier 1 Tracker has a date populated.

Locate the relevant applicant's URN folder stored under the Applications folder on OneDrive.

Open the UKRI Tier 1 Checklist and the attachments and review the information is correct.

Open the UKRI Tier 1 Tracker located in the SOP folder in the Global Talent Visa Applications folder in OneDrive.

Note: Liaise with the UKRI Funding Services Administrator if there are any discrepancies.

Update the Tracker and date (Page 4 of the Checklist).

If rejected, the Operations Support Manager will provide a rejection reason.

Note: Ensure the correct name is entered onto Page 4 of the Checklist under Second Approval and check that the correct name is entered onto the Tracker in the 'SRO to Sign Off Application Decision' field.

29 Update the first seven columns on the 2nd Review register.

A	B	C	D	E	F	G
URN	App Rec Date	SLA End date	Date passed to 2nd review	Status	To be done by:	Status
		12/03/2024		In Progress		
		12/03/2024	22/02/2024	Waiting 2nd Review	28/02/2024	Pending
		12/03/2024	22/02/2024	Waiting 2nd Review	28/02/2024	Pending

- 30 Update the 'Completed by Reviewer Passed to Reviewer 2' field on the UKRI Tier 1 Tracker.

AZ	BA	
Completed by Administrator Passed to Reviewer 1	Completed by Reviewer 1 Passed to Reviewer 2	Q
29/03/2021	29/03/2021	29
29/03/2021	29/03/2021	29
12/04/2021	12/04/2021	29
31/03/2021	31/03/2021	30
		30
07/04/2021	07/04/2021	31

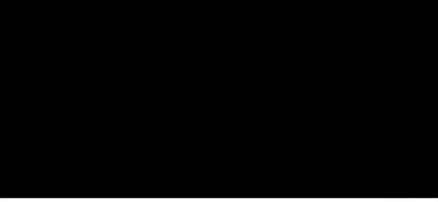
- 31 Associate Director Funding Operations, Delivery & Development/Head of Systems (Reviewer 2) - Actions

Review the Application and request any additional information if required.

Open the [2nd Review Register](#).

Fill out the required fields on the 2nd Review Register: Date done, completed by and Sent to HO.

Once a decision has been made, electronically sign and date the Checklist, updating the Approver's name is required and inform the Operations Support Manager of the decision.

Second Approval		
Approver (name):		
Give reasons for Rejection		Date: 13/04/2021
Administrative actions		
Tracker updated	☒	Date: 12/04/2021
Home Office advised	☒	Date: 13/04/2021
All documentation has been saved in the correct file structure	☒	Date: 12/04/2021

32 Decision Made

Check the correct information has been entered on the 2nd Reviewer Register and inform the Operations Administrator once this has been done.

33 Upon confirmation from the Operations Support Manager advising the Checklist has been fully completed, signed and dated, the Operations Administrator will:

- Open the UKRI Tier 1 Tracker and update the 'Completed', 'Date Home Office Advised of Decision' and 'Uploaded to SharePoint' fields.
- Open the UKRI Tier 1 Checklist and convert into PDF format, save the PDF in the applicants URN folder in OneDrive.
- Open the UKRI Endorsement Decision letter. A message will appear to advise you are opening a SQL file. Select **Yes** to continue.
- The decision is the Deputy Director's / Associate Director's decision, and this is stated clearly on the Endorsement Decision letter.
- Save the Endorsement decision letter to the Home Office to the relevant applicant's URN folder in OneDrive.
- When saved select the **'Mailings'** tab and scroll to the relevant record.
- Open **'Start Mail Merge'** and select **'Normal Word Document'** and then **Save** and then **Exit**.

Note: The Endorsement Decision letter, including the decision, will automatically be populated using the information entered the UKRI Tier 1 Tracker and the mail merge function.

UKRI Endorsement Decision

to be provided electronically to the Home Office

URN NUMBER: [REDACTED]
Applicant Name: [REDACTED]
Date of Application: 24/06/21
Date of referral to Endorsing Body: 24/06/21
Name of endorsing body: UKRI

TO BE COMPLETED BY AN AUTHORISED OFFICIAL OF ENDORSING BODY

Name of the authorised official: [REDACTED]
On behalf of: [REDACTED]

34 The Operations Administrator will:

- Find the original email received from the Home Office that relates to the relevant applicant and their URN.
- Reply to the email ([REDACTED]@homeoffice.gov.uk) by selecting **Reply All**.

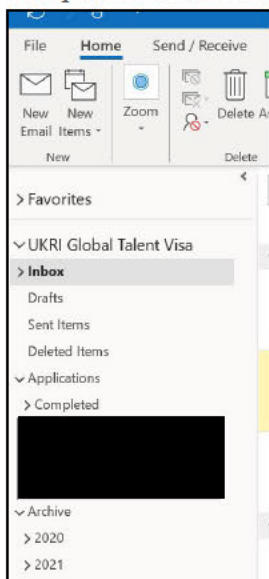
The email must be sent in the following format:

- Subject Line: OFFICIAL-SENSITIVE: Global Talent Visa Application – Applicant's name - URN number.
- The first line of text in the body of the email should read: OFFICIAL-SENSITIVE and be in font size 12.

The content of the email will advise that UKRI have completed all checks. See Annex B for email template to be used when notifying the Home Office of the decision.

Check the URN Number on the email matches the URN number on the Endorsement decision letter.

35 Save all the relevant emails, attachments and documents in the relevant applicant's URN folder in Outlook and OneDrive, and then move the outlook folder into the completed folder within the GTV mailbox.



36 In the process, you have learnt how to manage the Global Talent Visa application from receipt of the application from the Home Office to approval or rejection of the application (by the Deputy Director/ Associate Director).

END OF PROCESS

Annex A

The email below must be used to send to the Home Office confirmation that UKRI have completed their checks.

Email address: [REDACTED]@homeoffice.gov.uk

Include Attachment: Endorsement Decision Letter

Subject	RE: OFFICIAL- SENSITIVE: Global Talent Visa Application – Applicant's name – URN number OFFICIAL-SENSITIVE
Text	Dear [insert name of recipient], Please find attached the endorsement decision for URN [insert number]. Regards, [insert signature of approver]

Version Control

Version	Date	Author	Changes Made
1.0	02.11.2020	Business and Process Support, Funding Services	Initial Publish.
2.0	01.07.2021	Business and Process Support, Funding Services	Review of the process including the removal of all Siebel steps
3.0	02.08.2021	Business and Process Support, Funding Services	Step 18 updated to advise UKRI Funding Services to contact RO if HR contact is not listed as Director of Human Resources.
4.0	01.09.2021	Business and Process Support, Funding Services	Steps 40 – 51 added with new process for dealing with Endorsement Review forms where an applicant requests the outcome of their application to be reviewed.
5.0	24.01.2024	Business and Process Support, Funding Services	Updated SOP with new format and increased responsibility for Operations Administrators.
6.0		Business and Process Support, Funding Services	Updated in line with continuous improvement project changes



