

REF2 for UoA Co-ordinators



This feature is only available to REF UoA co-ordinators.

Contents

When do you need to act?.....	1
REF overview screen.....	1
Associated REF1.....	2
Attributed REF1.....	2
Data you cannot edit.....	3
Data you will need to edit.....	3
Workflow for selection to REF2021.....	3
Pure workflow.....	4
Data you may need to edit.....	4
Data you will not need to edit.....	4
Reporting.....	5




There is a separate user guide for authors that provides a general overview of [Pure and the REF](#).

As a REF UoA co-ordinator, you can edit REF2 records, which will help inform central decision-making on the University’s entire REF2 submission towards the end of the REF period.

Click on  along the top, then on  down the left-hand side.

When do you need to act?

When an output has been proposed, you will receive a notification that a REF2 has been created in your UoA (depending on your Pure user account settings).

Always click  or  or  where you see them before you close a window or section, or your changes will not be saved.

REF overview screen

- The REF module overview contains a summary table showing how many outputs are in each status on the *Workflow for selection to REF2021*.

- Clicking on any one of these statuses will take you to a summary screen filtered on that status. [You can also apply your own filters and even export the summary in list view.](#)

Overview	REF2 (2021)	4
REF2 (2021)	Proposed	2
Report definitions	Not selected for UoA pool	1
BETA New Reporting	Selected for UoA pool	1

Associated REF1

- There is only one REF2 record per output per UoA.
- When the output is proposed for the REF, it is proposed for all co-authors who have REF1 records in our Pure.
- If the co-authors are in the same UoA they automatically appear as *Associated REF1s* against this REF2.
- If the co-authors are in different UoAs, you will not see them as *Associated REF1s*.

REF2 (by unit of assessment)	Unit of Assessment	Year	REF OA compliance status	REF OA exception	Associated REF1s
test output REF2 (Output REF2021)	4	2019	REF OA Compliance MET		staff test REF1 (2021) staff test 3 REF1 (2021)
test output REF2 (Output REF2021)	5	2019	REF OA Compliance MET		staff test 2 REF1 (2021)

Attributed REF1

Attribution is only possible for people where the *Inclusion in the REF submission* value is Yes. This status is determined by the REF Decisions Panel and set in Pure by the Research Office.

- By default, the REF2 is not attributed to any associated REF1 record, even if there is only one associated REF1 in your UoA.

Attribution

Internal authors	Significant contribution	REF1 attribution	Attribution notes (internal)
Test, Staff (Test, S.) 4: Psychology, Psychiatry and Ne... Staff category: Category A Eligibility : Yes Inclusion in REF submission: Yes	<input type="radio"/> Yes <input checked="" type="radio"/> No	No	

- If you change the *Significant contribution* value to Yes, you can then change the *REF1 attribution* value to Yes for that person.

Attribution

Internal authors	Significant contribution	REF1 attribution	Attribution notes (internal)
Test, Staff (Test, S.) 4: Psychology, Psychiatry and Ne... Staff category: Category A Eligibility : Yes Inclusion in REF submission: Yes	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<div style="border: 1px solid #ccc; height: 40px;"></div>

- Whatever the REF1 attribution value, you should include the reason in the *Attribution notes* field against that author. The author cannot see the notes unless they have REF2 editor rights for the UoA.

Data you cannot edit

- You can view the metadata of the **associated research output** that underlies the REF2 at the top of the page.
- You can view the **submitter's reason for proposing** the output i.e. the proposal itself.
 - If the output was proposed by someone in another UoA you will not see anything in this section.

Data you **will** need to edit

Workflow for selection to REF2021

- This allows you to track the REF2 record's progress through the UoA's review and decision-making process.

Workflow for selection to REF2021

Selected for UoA pool *

Proposed Selected for review Selected for UoA pool Not selected for UoA pool

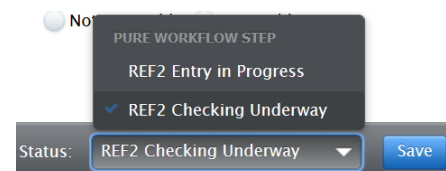
- The submitter will be able to edit their proposed REF2 and proposal text if the status of the REF2 remains *Proposed*.
- You should update the status to *Selected for review* as soon as the REF2 record enters the UoA's review process.
- If the UoA wishes to put this REF2 forward for institutional consideration, use the *Selected for UoA pool* status.
 - You can change this later if necessary e.g. if the output is replaced by a better one.
- If the UoA does not intend to submit this REF2 to the REF for any reason, use the *Not selected for UoA pool* status.

There is no notes field for the selection workflow. For audit purposes, you should record the reason for the UoA's decision in the [History and comments](#) section.

- When you choose *Selected for review*, you will be able to add:
 - An overall **predicted grade**. Visible to the academic.
 - **Peer comments**. Not visible to the academic. Peer reviewers do not have access unless they are also co-ordinators for your UoA, but you should add each peer reviewer's:
 - Reviewer Name
 - Predicted grade from that reviewer
 - Reviewer comment – full feedback can be detailed and should be saved on the Y drive, so this field should contain only the key/headline feedback to help the central decision-making panel.

Pure workflow

- This workflow is in the footer of the REF2 editor window and allows tracking of the REF2 record's progress through the institutional review and decision-making process.
- *Entry in progress* is the default step for new records.
- You should change it to *Checking underway* as soon as the UoA is satisfied the review is complete and the overall predicted grade is accurate.
 - You can still edit the record while in this status.
- This change tells us that the REF2 is ready for institutional consideration.
 - When the central panel is ready to consider this REF2 record, we will change its status to a third *Confirmed* step, which locks the record.
 - We can return it to one of the earlier statuses if changes are needed.



Data you **may** need to edit



Any changes to these fields will inform central decision-making.

- Additional information (300 words) if required by the REF panel.
- Double-weighting.
- Interdisciplinary research.
- Cross-referral to another UoA,
- Sensitive output.
- Will be published between 30/11/2020 and 31/12/2020.
- *Was early online*.

Data you will **not** need to edit

- **Output type** is system-defined based on the research output record that underlies the REF2.
- **DOI/PDF/Physical copy tracking** will be handled by the Research Office.

Reporting

- You can make use of several tables in the REF2 section:
 - o **REF2 Individual Profile** shows you each person in your UoA, key details about them, their predicted grades and the number of REF2s they have in each selection status. You can also  Export this.
 - o **REF2 Attribution Profile** breaks REF2 into attributed and non-attributed figures. You can also  Export this.
 - o **REF2 candidates OA tracking** tracks some open access relevant information.
 - o **REF2 candidates OA summary** summarises outputs by open access status.
- Users with REF Reporter rights can also create custom reports using the reporting module.

Guide updated 31/07/2019