



UK Visas  
& Immigration

## **The sponsorship management system (SMS) manuals**

Step by step guide for sponsors

Manual 4 of 12: Creating CAS

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## Additional SMS manuals

There are 12 SMS manuals available, plus two supplementary policy manuals for completing a CoS and CAS. The manuals are grouped into three categories: common, CAS and CoS. The table below describes the purpose and audience of each manual.

You should read all manuals applicable to your licence before contacting the relevant helpdesk.

Manual reference	Manual title	Type	Purpose	Audience
Manual 1	<a href="#">Introduction to SMS</a>	Common	<p>Use this manual to log into SMS, change your password, manage SMS users and view important messages posted by the Home Office.</p> <p>In addition, this manual explains who should use SMS and for what purpose. The manual features a full introduction to SMS as well as a comprehensive troubleshooting section.</p>	All sponsors
Manual 2	<a href="#">Managing your licence</a>	Common	To help sponsors manage their key personnel, change their licence details, and apply for allocations of CoS/CAS.	All sponsors

Manual 3	<a href="#">Applications, renewals and services</a>	Common	To help sponsors apply for Premium customer service, apply or decline to apply for a Basic Compliance Assessment, renew their sponsor licence and manage action plans.	All sponsors
Manual 4	<a href="#">Creating and assigning CAS</a>	CAS	To help sponsors create and assign individual and batches of CAS.	Sponsors licensed in Tier 4 (General and / or Child)
Manual 4a	<a href="#">Creating a CAS – guide for education sponsors</a>	CAS	This guide contains supplementary information on completing a CAS. Use this guide to determine what information is necessary in each field of the CAS.	Sponsors licensed in Tier 4 (General and / or Child)
Manual 5	<a href="#">Reporting student activity</a>	CAS	To help sponsors report student activity, for example if a student's circumstances change. This manual also contains help with reporting fee updates and adding sponsor notes to CAS that have already been assigned.	Sponsors licensed in Tier 4 (General and / or Child)
Manual 6	<a href="#">Bulk Data Transfer of CAS</a>	CAS	To help sponsors use the bulk data transfer (BDT) functions of SMS. You must have a bespoke IT system in place to use BDT.	Sponsors licensed in Tier 4 (General and / or Child)

Manual 7	<a href="#">Miscellaneous CAS functions</a>	CAS	To help sponsors complete all other functions of CAS, such as managing batches of CAS, managing pre-stored addresses for use when creating CAS, transferring ownership of CAS, printing CAS and exporting CAS.	Sponsors licensed in Tier 4 (General and / or Child)
Manual 8	<a href="#">Creating and assigning CoS</a>	CoS	To help sponsors create and assign individual and batches of CoS.	Sponsors licensed in any Tier 2 or Tier 5 category
Manual 8a	<a href="#">Creating a CoS – guide for business sponsors</a>	CoS	This guide contains supplementary information on completing a CoS. Use this guide to determine what information is necessary in each field of the CoS.	Sponsors licensed in any Tier 2 or Tier 5 category
Manual 9	<a href="#">Reporting worker activity</a>	CoS	To help sponsors report worker activity, for example if a worker's circumstances change. This manual also contains help with adding sponsor notes to CoS that have already been assigned.	Sponsors licensed in any Tier 2 or Tier 5 category
Manual 10	<a href="#">Miscellaneous CoS functions</a>	CoS	To help sponsors complete all other functions of CoS, such as managing batches of CoS, managing pre-stored addresses for use when creating CoS, transferring ownership of CoS, and printing CoS.	Sponsors licensed in any Tier 2 or Tier 5 category

Manual 11	<a href="#">Tier 5 Creative and Sporting groups of CoS</a>	CoS	To help sponsors create and manage groups of CoS. Groups of CoS are only available to sponsors licensed in Tier 5 (Creative and Sporting).	Sponsors licensed in any Tier 2 or Tier 5 category
Manual 12	<a href="#">Restricted CoS</a>	CoS	To help sponsors apply for restricted CoS, track applications for restricted CoS and once granted, create restricted CoS.	Sponsored licensed in Tier 2 (General)

## Glossary

<b>SMS</b>	Sponsorship Management System
<b>CoS</b>	Certificate of Sponsorship
<b>CAS</b>	Confirmation of Acceptance for Studies
<b>AO</b>	Authorising Officer
<b>KC</b>	Key Contact
<b>BDT</b>	Bulk Data Transfer
<b>SELT</b>	Secure English Language Test
<b>.XML</b>	Extensible Mark-up Language
<b>.PDF</b>	Portable Document Format
<b>Automation</b>	On 6 April 2014 we introduced new functionality in SMS to automatically renew CoS allocations and to apply changes to your address, or that of your AO and KC. We will write to you if you meet the criteria and automation has been set.

## CAS status

The table below shows each status which can apply to a CAS.

As seen in SMS	Meaning
WORK IN PROGRESS	The CAS is still 'in draft' as one or more mandatory fields are yet to be completed.
READY TO GO	All mandatory fields are complete and the CAS is ready to be assigned to an individual.
ASSIGNED	The CAS has been assigned to an individual in SMS and is ready to be used in support of an application for leave to enter/remain in the UK.
WITHDRAWN	You have used the 'Manage live CAS' function in SMS to withdraw the CAS.
OBSOLETE	SMS has automatically changed the CAS status to 'Obsolete' as it has detected that another CAS assigned to the same individual has been marked as 'Used' within the validity period of this CAS.
USED	The CAS has been used in support of a student's application for leave to enter or remain.
EXPIRED	EITHER: The individual has not made an application for leave to enter or remain before the expiry date of the CAS. A new CAS is required. OR: The individual has applied before the CAS expiry date but we have not considered their application before that CAS date. In this case, no action is required on your part; we will change the status of the CAS from EXPIRED to USED when the application is considered.
CANCELLED	The CAS has been cancelled as your licence has been revoked or has expired, or you have surrendered the relevant category / your whole licence prior to the CAS being used.

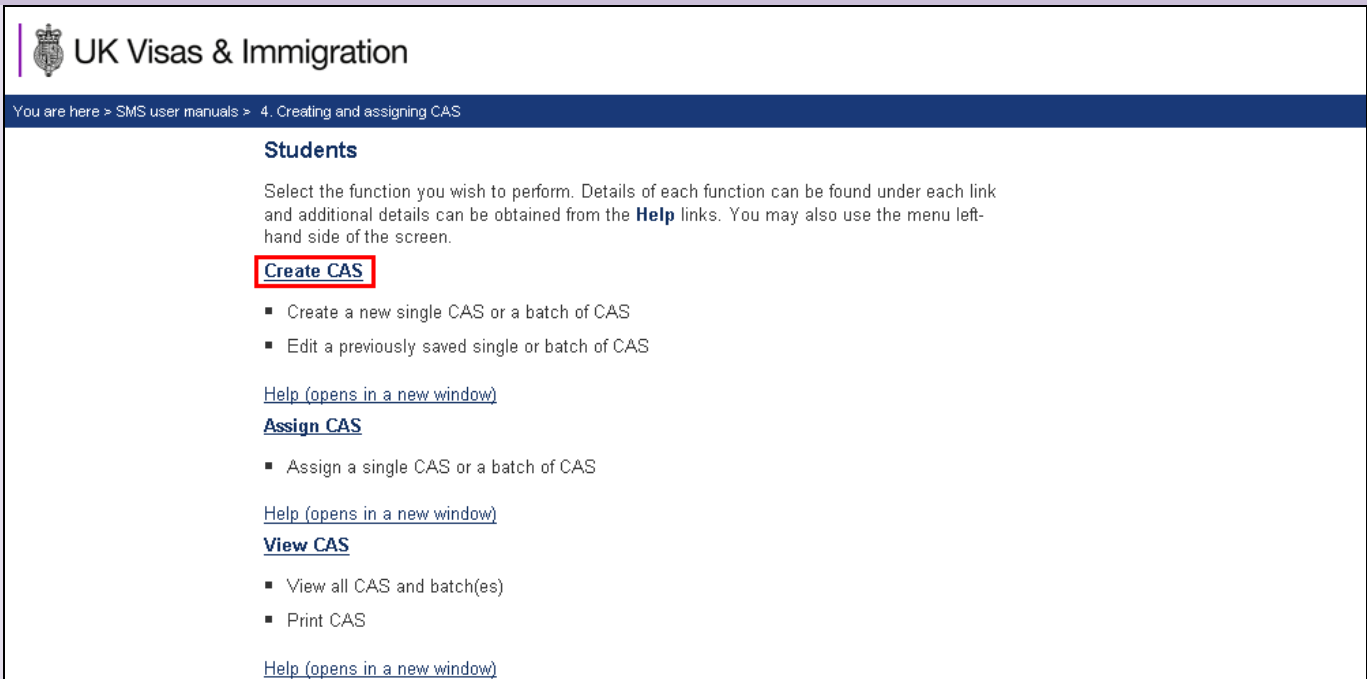


## SMS guides

### Guide 1: How to create and assign a new single CAS

Follow the step by step instructions below to create and assign a CAS.

You should read the [Sponsorship policy guidance](#) and [SMS guide 4a – Creating a CAS – guide for education sponsors](#) before creating and assigning CAS.

Step	Instruction	Screen example
1	From the <b>Students</b> screen, select <b>Create CAS</b> .	 <p>The screenshot shows the 'UK Visas &amp; Immigration' website. The breadcrumb trail reads 'You are here &gt; SMS user manuals &gt; 4. Creating and assigning CAS'. The main heading is 'Students'. Below this, there is a paragraph: 'Select the function you wish to perform. Details of each function can be found under each link and additional details can be obtained from the <b>Help</b> links. You may also use the menu left-hand side of the screen.' The 'Create CAS' link is highlighted with a red box. Below it are two bullet points: 'Create a new single CAS or a batch of CAS' and 'Edit a previously saved single or batch of CAS'. There are also links for 'Help (opens in a new window)', 'Assign CAS', 'View CAS', and another 'Help (opens in a new window)' link at the bottom.</p>

From the **Create a CAS** screen, select the relevant category (General or Child) and choose **Next**.

2

If you are only licensed under one of these categories, the drop-down list will default to that category and this step won't be necessary.

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### Create a CAS

Select a category and choose **Next** to continue or **Back** to return to the **Students** screen.

Select a category

Please select

- Tier 4 (Child)
- Tier 4 (General)

Back Next

3

From the second **Create a CAS** screen, select **Create new single CAS** and choose **Next**.

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### Create a CAS

Select what you want to do and choose **Next** to continue or **Back** to return to previous screen.

Tier and category

Tier 4 (General)

Select from the options below:

- Create new single CAS
- Create new batch of CAS
- Find an existing single CAS
- Find an existing batch of CAS

Back Next

### Create a CAS

All fields marked with an asterisk (\*) are mandatory and must be completed to assign a CAS. To save the CAS choose **Save** at the bottom of the screen. If you do not want to save the changes choose **Cancel**. Ensure you save your data regularly, as your session will time out after 20 minutes of inactivity.

If you are editing a previously saved CAS, the option to choose to **Delete** the CAS will also be available.

#### Tier and category

Tier 4 (General)

#### Student details

Enter the details of the student to which you want to assign the CAS. Where applicable, complete the information as shown in their passport.

#### Student details

Family name: \*

Given name(s):

Other names:

Date of birth: \*

Gender: \*

#### Overseas institution details (if applicable)

Overseas higher education institution name:

Pre-stored address:

[Help \(opens in a new window\)](#)

4

From the third **Create a CAS** screen, complete the details of the individual you wish to sponsor, then select **Save**.

**Note** You must complete the **Family name** field as a minimum to save the CAS.

### Confirmation of saved CAS

Select from the options below, choose:

- **Amend** to edit information on the CAS.
- **Assign** to pay for and assign the CAS. This option will only be available if all mandatory fields in the CAS have been completed. Once a CAS has been assigned it cannot be amended.
- **Link** to link the CAS to a batch.
- **Delete** to delete the CAS.
- **Exit** to return to the previous screen.

#### Tier and category

Tier 4 (General)

#### Student details

Passport number:	4757675747
Family name:	Smith
Given name(s):	Bill
Nationality:	ANDORRA
Date of birth:	29/05/1942
Course start date:	27/08/2014
Course title:	Maths

[Exit](#) [Link](#) [Assign](#) [Amend](#) [Delete](#)

5

From the **Confirmation of saved CAS** screen, choose **Assign**.

If you need to change any details, select **Amend**.

### Note

1. If **Assign** is unavailable (greyed out), one or more mandatory fields in the CAS may not have been completed. The most common reason is the **Main study address** fields have not been completed. Select **Amend** to edit the CAS.
2. Select **Delete** to delete the CAS if it is no longer required. You can only delete CAS that have not been assigned.

### Assign CAS

Check the information and choose **Assign** to assign the CAS or choose **Back** to return to the previous screen.

#### Current allocation details

The current allocation you hold against the category you are going to assign this CAS under is shown below. You will not be able to assign this CAS if you have used all of your allocation.

Tier and category:	Tier 4 (General)
Limit:	100
Unused:	100

#### Student details

##### Student details

Family name: test  
Given name(s): test

##### Partner institution details (if applicable)

None provided

##### Overseas institution details (if applicable)

None provided

[Back](#)

[Assign](#)

6

On the **Assign CAS** screen, if the details displayed are correct, select **Assign**.

If you need to make further changes, select **Back**.

**Note** Your current CAS allocation is also displayed in this screen. You must have a current *Unused* allocation of CAS in order to assign a CAS. If your *Unused* allocation is zero, you must apply to increase your allocation by using either the **Request CoS/CAS increase** or **Request renewal of annual CoS/CAS allocations** (if applicable) function found in **Licence summary, applications and services**.

From the **Online payment** screen, select **OK** to proceed through the payment process.

- 7 When you have completed payment, the **Confirmation of assigned CAS** screen is displayed. The creation and assignment process is now complete.


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### Online payment

You are about to be redirected to a third party online payment service to pay. Once you have paid, you will be brought back to the sponsorship management system to confirm that the CAS has been assigned. The CAS number will then be available for you to give to the student. All payments must be made in pounds sterling (£). Choose **OK** to be redirected to WorldPay or if you do not want to proceed choose **Cancel** to return to the previous screen.

The following cards will be accepted:



Electronic payments are powered by:



**Payment amount**

Amount:	14
---------	----

8

On the **Confirmation of Assigned CAS**, the CAS has now been assigned.

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### Confirmation of Assigned CAS

The CAS has been assigned, you should take a note of the CAS number and then give the number to the student. Choose **OK** to continue.

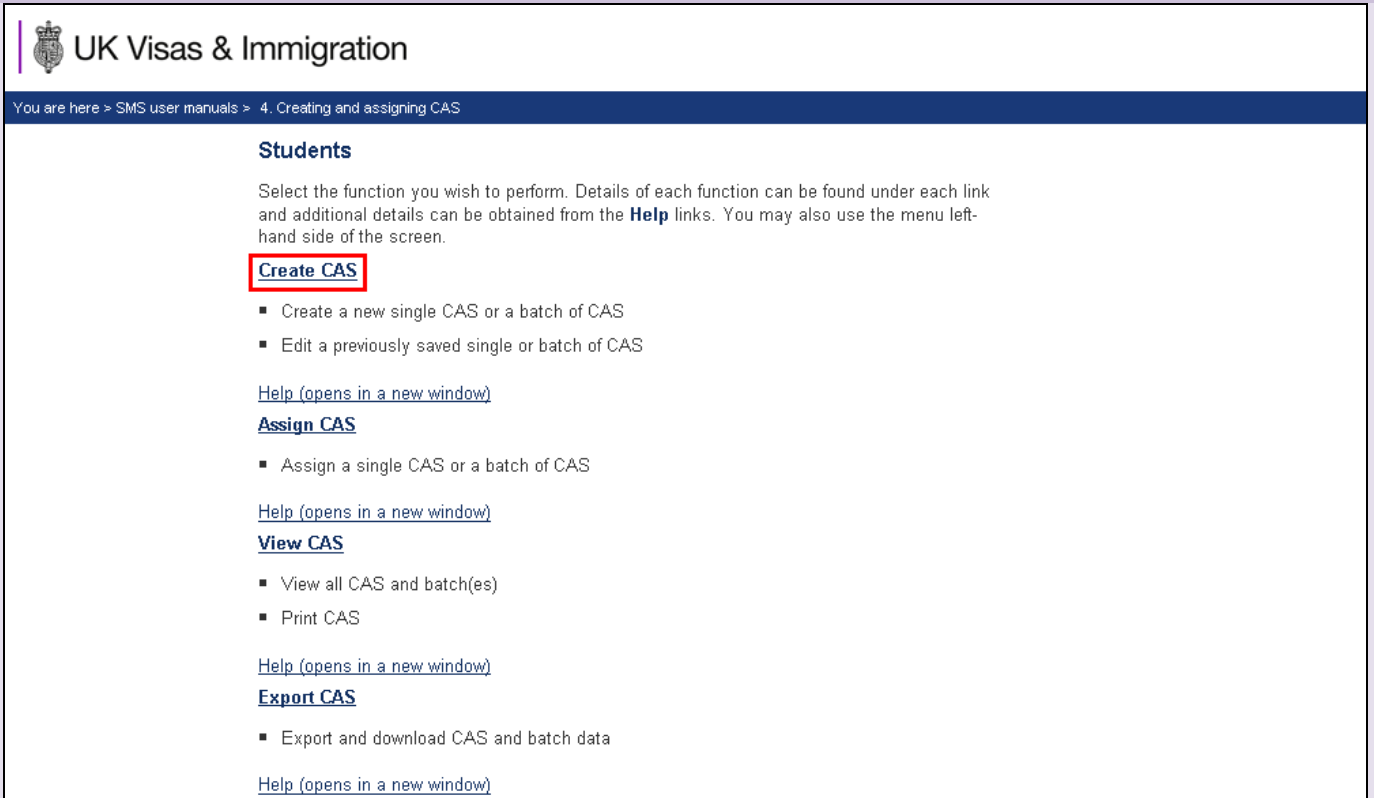
Tier and category	
Tier 4 (General)	
CAS details	
CAS number:	E4G6IA7A18SDA3
Date assigned:	03/03/2014
Expiry date (use by):	04/09/2014
Student details	
Passport number:	09809808908
Family name:	test
Given name(s):	test
Nationality:	BRAZIL
Date of birth:	30/03/1939
Course start date:	27/10/2014
Course title:	Maths

**OK**

## Guide 2: How to create and assign a new batch of CAS

Follow the step by step instructions to create and assign a batch of CAS.

You should read the [Sponsorship policy guidance](#) and [SMS guide 4a – Creating a CAS – guide for education sponsors](#) before creating and assigning batches of CAS.

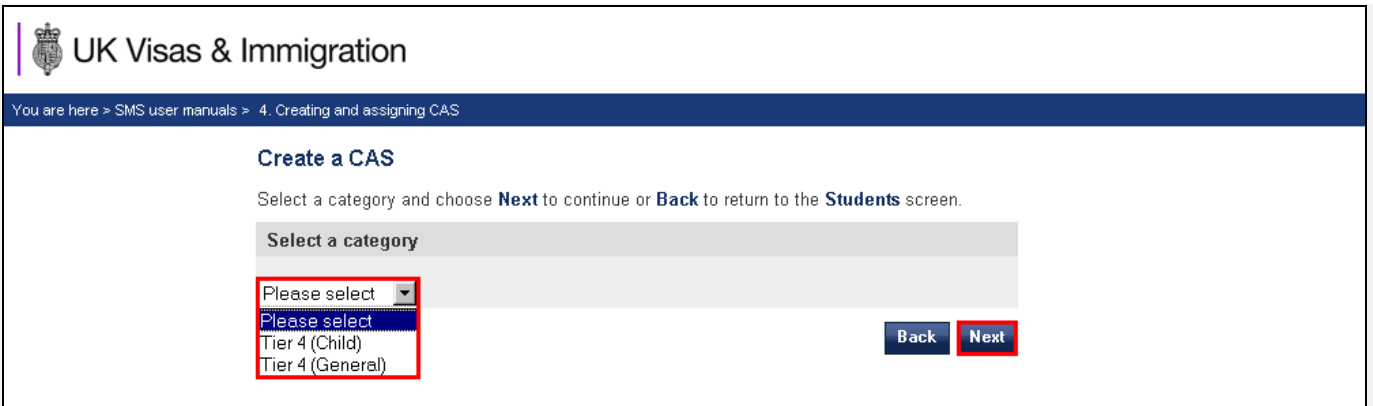
Step	Instruction	Screen example
1	From the <b>Students</b> screen, select <b>Create CAS</b> .	 <p>The screenshot shows the 'UK Visas &amp; Immigration' website. The breadcrumb trail is 'You are here &gt; SMS user manuals &gt; 4. Creating and assigning CAS'. The main heading is 'Students'. Below it, there is a paragraph: 'Select the function you wish to perform. Details of each function can be found under each link and additional details can be obtained from the <b>Help</b> links. You may also use the menu left-hand side of the screen.' The 'Create CAS' link is highlighted with a red box. Below it are two bullet points: 'Create a new single CAS or a batch of CAS' and 'Edit a previously saved single or batch of CAS'. There are also 'Help (opens in a new window)' links for 'Create CAS', 'Assign CAS', and 'Export CAS'. The 'Assign CAS' section has a bullet point: 'Assign a single CAS or a batch of CAS'. The 'View CAS' section has two bullet points: 'View all CAS and batch(es)' and 'Print CAS'. The 'Export CAS' section has a bullet point: 'Export and download CAS and batch data'.</p>



From the **Create a CAS** screen, select the relevant category (General or Child) and choose **Next**.

2

If you are only licensed under one of these categories, the drop-down list will default to that category and this step won't be necessary.



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### Create a CAS

Select a category and choose **Next** to continue or **Back** to return to the **Students** screen.

Select a category

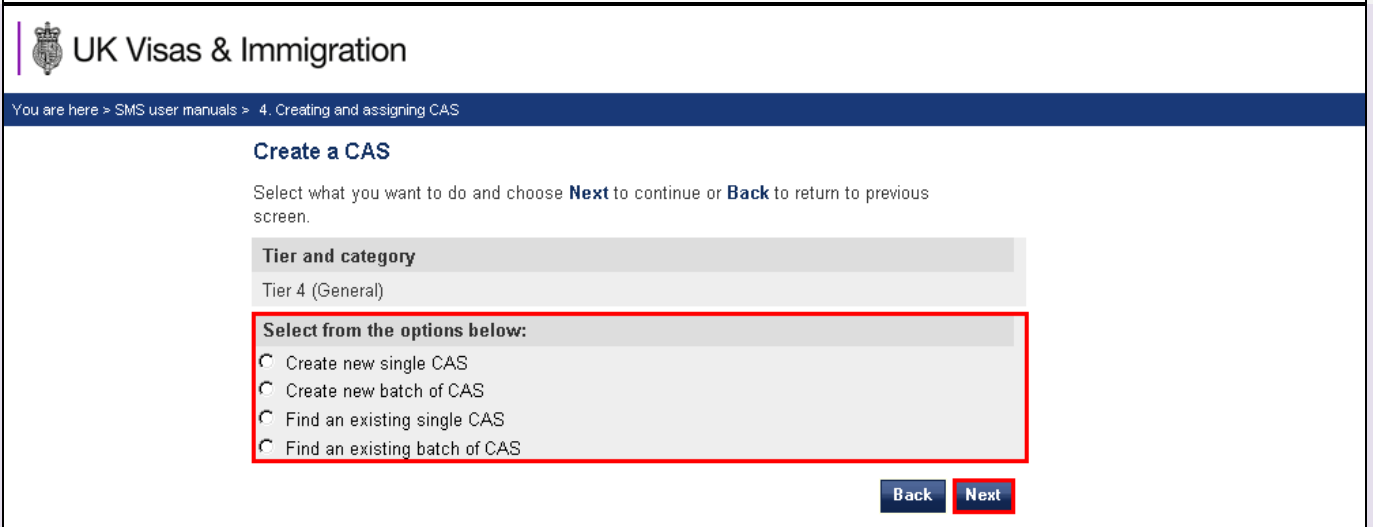
Please select

- Tier 4 (Child)
- Tier 4 (General)

Back Next

3

From the second **Create a CAS** screen, select **Create new batch of CAS** and **Next**.



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### Create a CAS

Select what you want to do and choose **Next** to continue or **Back** to return to previous screen.

Tier and category

Tier 4 (General)

Select from the options below:

- Create new single CAS
- Create new batch of CAS
- Find an existing single CAS
- Find an existing batch of CAS

Back Next

### Create a CAS

Select what you want to do and choose **Next** to continue or **Back** to return to previous screen.

#### Tier and category

Tier 4 (General)

#### Select from the options below:

- Create new single CAS
- Create new batch of CAS
- Find an existing single CAS
- Find an existing batch of CAS

#### Create new batch of CAS

Batch name:

[Help \(opens in a new window\)](#)

**Back**

**Next**

- 4 From the final **Create a CAS** screen, enter the batch name, then select **Next**.

**Note** The name of the batch should be something memorable, as you might need to retrieve it later.

### Batch details

This screen should be used to populate a batch with CAS records. A maximum of 100 CAS will be displayed on this screen. Select from the options below, choose:

- **Save batch details** to save any changes to the batch name.
- **Unlink** to remove a CAS from a batch without deleting the CAS.
- **Edit** to make changes to the CAS or delete the CAS from the batch.
- **Upload** to upload CAS to the batch.
- **Add CAS** to add a single CAS to the batch.
- **Add pre-populated CAS** to add a CAS pre-populated with the non-personal details of the last CAS created within this batch.
- **Exit** if you do not wish to continue.
- **Delete all** to delete the whole batch and its contents.
- **Assign** to pay for and assign the batch. All CAS must have a status of **Ready to go** for **Assign** to be active.

#### Tier and category

Tier 4 (General)

#### Batch details

Batch name: \*   
[Help \(opens in a new window\)](#)  
 Number of CAS in batch: 0  
 Owner: Towner, Terry (1JUBR68W0)  
 Status: WORK IN PROGRESS  
 Date created: 03/03/2014

#### Details of CAS within batch


CAS status	Family name	Given name	Date of birth	Nationality	Passport number	Course start date
[Empty table with scrollbars]						

5 From the **Batch details** screen, select **Add CAS** (two buttons available).

**Note** **Assign** will be not available (greyed out) until you have added a CAS to the batch.

6

From the **Create a CAS** screen, complete the student details and course details then select **Save**.

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### Create a CAS

All fields marked with an asterisk (\*) are mandatory and must be completed to assign a CAS. To save the CAS choose **Save** at the bottom of the screen. If you do not want to save the changes choose **Cancel**. Ensure you save your data regularly, as your session will time out after 20 minutes of inactivity.

If you are editing a previously saved CAS, the option to choose to **Delete** the CAS will also be available.

**Tier and category**  
Tier 4 (General)

**Batch details**  
Batch name: Test batch

### Student details

Enter the details of the student to which you want to assign the CAS. Where applicable, complete the information as shown in their passport.

**Student details**

Family name: \*

Given name(s):

Other names:

Date of birth: \*

Gender: \*

**Overseas institution details (if applicable)**

Overseas higher education institution name:

Pre-stored address:


[Help \(opens in a new window\)](#)

7

From the **Batch details** screen, you can now see that the CAS you just created is displayed beneath the **Details of CAS within batch** heading.

Repeat the steps above to add additional CAS to the batch.

Once you have added all required CAS to the batch, select **Assign**.

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### Batch details

This screen should be used to populate a batch with CAS records. A maximum of 100 CAS will be displayed on this screen. Select from the options below, choose:

- **Save batch details** to save any changes to the batch name.
- **Unlink** to remove a CAS from a batch without deleting the CAS.
- **Edit** to make changes to the CAS or delete the CAS from the batch.
- **Upload** to upload CAS to the batch.
- **Add CAS** to add a single CAS to the batch.
- **Add pre-populated CAS** to add a CAS pre-populated with the non-personal details of the last CAS created within this batch.
- **Exit** if you do not wish to continue.
- **Delete all** to delete the whole batch and its contents.
- **Assign** to pay for and assign the batch. All CAS must have a status of **Ready to go** for **Assign** to be active.


**Tier and category**  
Tier 4 (General)

**Batch details**  
Batch name: \*   
[Help \(opens in a new window\)](#)  
Number of CAS in batch: 1  
Owner: Towner, Terry (1jUBR68v0)  
Status: READY TO GO  
Date created: 03/03/2014

**Details of CAS within batch**

	CAS status	Family name	Given name	Date of birth	Nationality	Passport number	Course start date
<input type="button" value="Unlink"/> <input type="button" value="Edit"/>	READY TO GO	Smith	John	20/01/1919	ANGUILLA	23423423	27/03/2014

8 From the **Confirm assignment of batch** screen, select **Assign**.

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### Confirm assignment of batch

Confirm that you would like to assign the batch by choosing **Assign**. You will need to have enough CAS remaining in your allocation to cover the whole batch to continue. If you do not want to continue choose **Cancel** to return to the **Assign CAS - search** screen.

#### Current allocation details


Allocation details

Tier and category:	Tier 4 (General)
Limit:	100
Unused:	99

#### Batch details

Batch name:	Test batch
Number of CAS in batch:	1

- 9 From the **Online payment** screen, select **OK** then proceed through the payment process.


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### Online payment

You are about to be redirected to a third party online payment service to pay. Once you have paid, you will be brought back to the sponsorship management system to confirm that the CAS has been assigned. The CAS number will then be available for you to give to the student. All payments must be made in pounds sterling (£). Choose **OK** to be redirected to WorldPay or if you do not want to proceed choose **Cancel** to return to the previous screen.

The following cards will be accepted:




Electronic payments are powered by:



**Payment amount**

Batch name:	Test batch
Number of CAS in batch:	1
Amount:	14

- 10 Following successful payment, you will be returned to the **Confirmation of assigned batch** screen, where you can see that the CAS has been assigned a **CAS number**.

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### Confirmation of assigned batch

The batch has been assigned successfully. The batch contents are displayed alphabetically. If this is a very large batch of CAS, not all CAS may be displayed. If this is the case, use the export CAS function for a full list. You should now give the CAS numbers to the students. Choose **OK** to continue.

**Batch details**

Batch name:	Test batch
Number of CAS in batch:	1

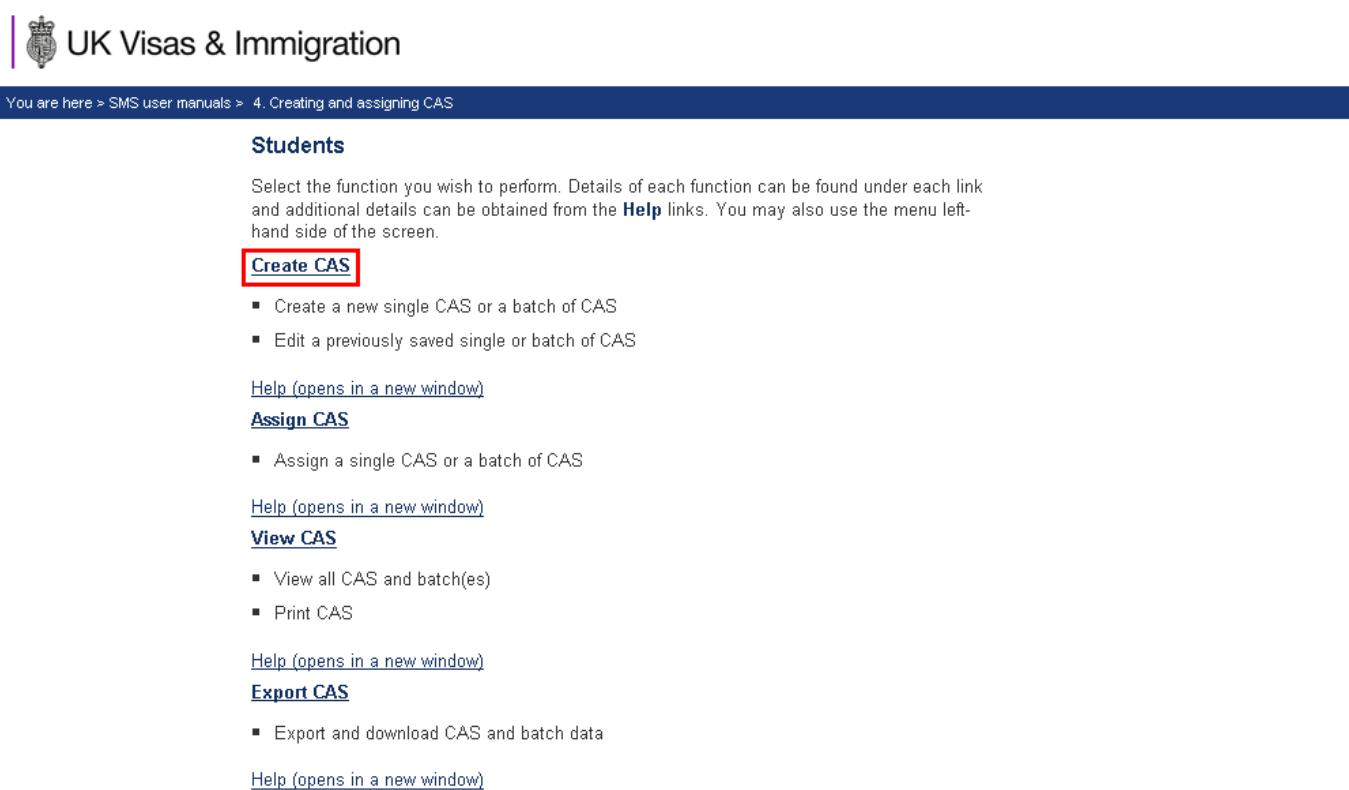
**CAS summary**

CAS number	Family name	Given name	Date of birth	Nationality	Passport number	Course start date
E4G6IA7A18T0AD	Smith	John	20/01/1919	ANGUILLA	23423423	27/03/2014

## Guide 3: How to edit or delete a single CAS

Follow the step by step instructions below to edit or delete a single CAS. These functions are useful if you wish to edit a CAS before assigning it or you wish to delete a CAS that is no longer required.

You should read the [Sponsorship policy guidance](#) and [SMS guide 4a – Creating a CAS – guide for education sponsors](#) before editing or deleting a CAS.

Step	Instruction	Screen example
1	From the <b>Student</b> screen, select <b>Create CAS</b> .	 <p>The screenshot shows the 'UK Visas &amp; Immigration' website. The breadcrumb trail is 'You are here &gt; SMS user manuals &gt; 4. Creating and assigning CAS'. The main heading is 'Students'. Below this, there is a paragraph: 'Select the function you wish to perform. Details of each function can be found under each link and additional details can be obtained from the <b>Help</b> links. You may also use the menu left-hand side of the screen.' The 'Create CAS' link is highlighted with a red box. Below it are two bullet points: 'Create a new single CAS or a batch of CAS' and 'Edit a previously saved single or batch of CAS'. There are also 'Help (opens in a new window)' links for 'Create CAS' and 'Assign CAS'. Below 'Assign CAS' are two more bullet points: 'Assign a single CAS or a batch of CAS' and 'View CAS'. There are 'Help (opens in a new window)' links for 'View CAS' and 'Export CAS'. Below 'Export CAS' are two more bullet points: 'Export and download CAS and batch data' and 'Help (opens in a new window)'.</p>



From the **Create a CAS** screen, select the relevant category (General or Child) and choose **Next**.

2

If you are only licensed under one of these categories, the drop-down list will default to that category and this step won't be necessary.

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### Create a CAS

Select a category and choose **Next** to continue or **Back** to return to the **Students** screen.

Select a category

Please select

- Please select
- Tier 4 (Child)
- Tier 4 (General)

Back Next

3

From the second **Create a CAS** screen, select **Find an existing single CAS** and then **Next**.

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### Create a CAS

Select what you want to do and choose **Next** to continue or **Back** to return to previous screen.

Tier and category

Tier 4 (General)

Select from the options below:

- Create new single CAS
- Create new batch of CAS
- Find an existing single CAS
- Find an existing batch of CAS

Back Next

4

From the final **Create a CAS** screen, enter your search parameters, then select **Next**.

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### Create a CAS

Select what you want to do and choose **Next** to continue or **Back** to return to previous screen.

**Tier and category**

Tier 4 (General)

**Select from the options below:**

- Create new single CAS
- Create new batch of CAS
- Find an existing single CAS
- Find an existing batch of CAS

**Find an existing single CAS**

Passport number:

Family name:

Given name(s):

Date of birth:

[Help \(opens in a new window\)](#)

**Back** **Next**

**Note**

If your search parameters are not specific, you will be presented with a long list of CAS. This screen is not featured in this guide. Select the CAS you wish to edit or delete. If your search parameters are specific, you will be presented with the screen below.

### Edit an existing CAS

Enter the details of the student to which you want to assign the CAS. Where applicable, complete the information as shown in their passport.

#### Tier and category

Tier 4 (General)

#### Student details

Enter the details of the student to which you want to assign the CAS. Where applicable, complete the information as shown in their passport.

**Student details**

Family name: \*

Given name(s):

Other names:

Date of birth: \*

Gender: \*

**Partner institution details (if applicable)**

Partner institution name:

Partner institution sponsor licence number (if known):

Pre-stored address:

[Help \(opens in a new window\)](#)

**Overseas institution details (if applicable)**

Overseas higher education institution name:

Pre-stored address:

[Help \(opens in a new window\)](#)

5

From the **Edit an existing CAS** screen, edit the details you wish to change, then select **Save**.

If you wish to delete the CAS, select **Delete**. You will now be asked to confirm the deletion. Select **Delete** to proceed.

### Confirmation of saved CAS

Select from the options below, choose:

- **Amend** to edit information on the CAS.
- **Assign** to pay for and assign the CAS. This option will only be available if all mandatory fields in the CAS have been completed. Once a CAS has been assigned it cannot be amended.
- **Link** to link the CAS to a batch.
- **Delete** to delete the CAS.
- **Exit** to return to the previous screen.

#### Tier and category

Tier 4 (General)

#### Student details

Passport number:	4757675747
Family name:	Smith
Given name(s):	Bill
Nationality:	ANDORRA
Date of birth:	29/05/1942
Course start date:	27/08/2014
Course title:	Maths

[Exit](#) [Link](#) [Assign](#) [Amend](#) [Delete](#)

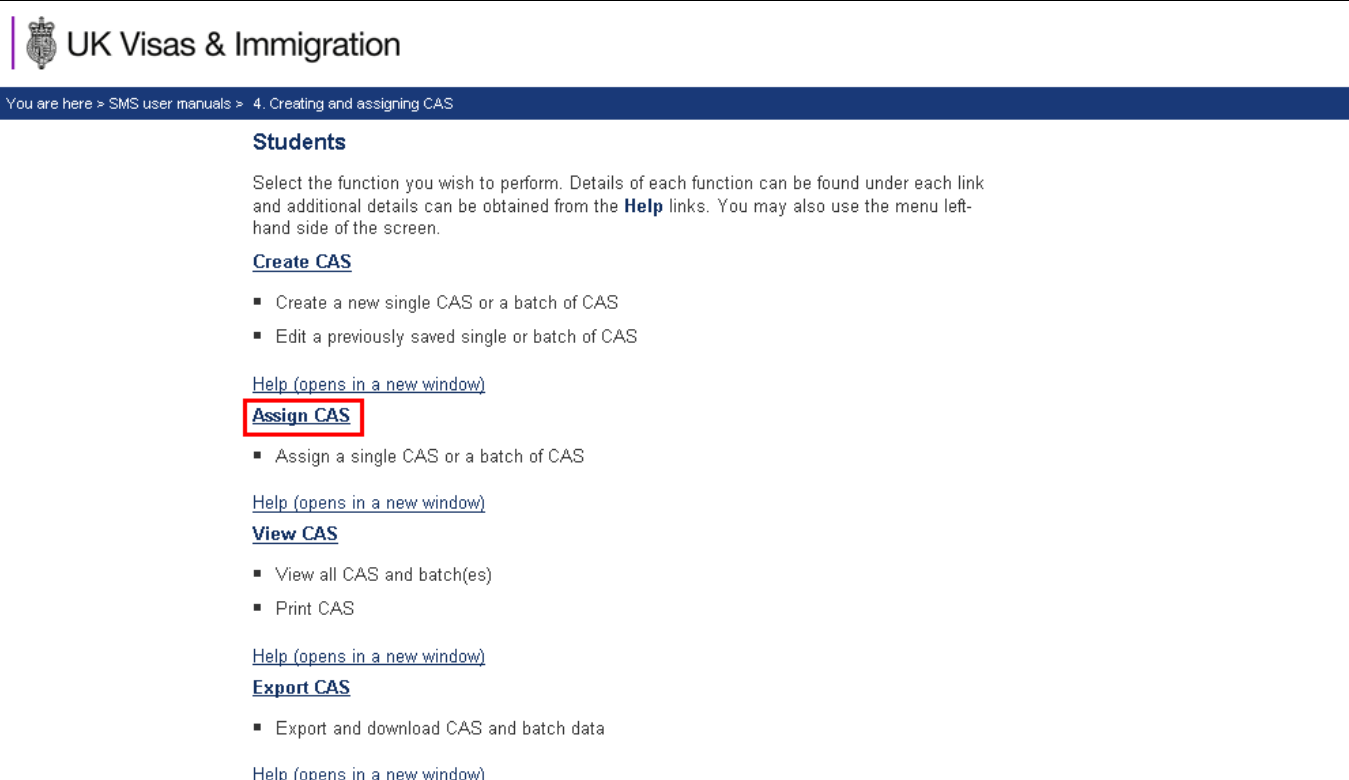
*After editing:*

- 6 From the **Confirmation of saved CAS** screen, you can see the amended details.

## Guide 4: How to assign a CAS (having created it earlier)

Follow the step by step instructions below to assign a single CAS. This function is useful if you have previously created a CAS and saved it (showing a status of READY TO GO), but did not assign it.

You should read the [Sponsorship policy guidance](#) and [SMS guide 4a – Creating a CAS – guide for education sponsors](#) before assigning CAS.

Step	Instruction	Screen example
1	From the <b>Students</b> screen, select <b>Assign CAS</b> .	 <p>The screenshot shows the 'UK Visas &amp; Immigration' website. The breadcrumb trail is 'You are here &gt; SMS user manuals &gt; 4. Creating and assigning CAS'. The main heading is 'Students'. Below this, there is a paragraph of text: 'Select the function you wish to perform. Details of each function can be found under each link and additional details can be obtained from the <b>Help</b> links. You may also use the menu left-hand side of the screen.' There are three main sections: 'Create CAS', 'View CAS', and 'Export CAS'. Each section has a list of actions and a 'Help (opens in a new window)' link. The 'Assign CAS' link under the 'Create CAS' section is highlighted with a red box.</p>

2

From the **Assign CAS** screen, select **Assign single CAS**.

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### Assign CAS

Choose from the menu below either to assign a single CAS or assign a batch of CAS.

**Assign single CAS**

- Find and assign a single CAS

[Help \(opens in a new window\)](#)

**Assign batch**

- Find and assign a batch of CAS

[Help \(opens in a new window\)](#)

3

From the **Search for a single CAS to assign** screen, enter your parameters, then select **Next**.

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### Search for a single CAS to assign

Enter the search criteria to find the CAS that you want to assign.

Wildcards are supported for family name and given name - if they are used, at least the first three characters must be supplied. A wildcard search requires a minimum of three characters plus an "\*", for example SMI\* entered as a family name would return all CAS for a student whose family name started with the letters 'SMI'. Either the passport/travel document number or family name field must be supplied.

Choose **Next** to continue, **Advanced** for a more detailed search or **Back** to return to the previous screen.

[Help \(opens in a new window\)](#)

**Student details**

Passport number:

Family name:

Given name(s):

Date of birth:

[Help \(opens in a new window\)](#)

**Back** **Advanced** **Next**

**Note**

If your search parameters are not specific, you will be presented with a long list of CAS. This screen is not featured in this guide. Select the CAS you wish to assign. If your search parameters are specific, you will be presented with the screen below.

### Assign CAS

Check the information and choose **Assign** to assign the CAS or choose **Back** to return to the previous screen.

#### Current allocation details

The current allocation you hold against the category you are going to assign this CAS under is shown below. You will not be able to assign this CAS if you have used all of your allocation.

Tier and category:	Tier 4 (General)
Limit:	100
Unused:	98

#### Student details

<b>Student details</b>	
Family name:	Smith
Given name(s):	Bill
Other names:	
Date of birth:	29/05/1942
Gender:	Male
<b>Partner institution details (if applicable)</b>	
None provided	
<b>Overseas institution details (if applicable)</b>	
None provided	


[Back](#) [Assign](#)

- 4 From the **Assign CAS** screen, ensure the details are correct, and then select **Assign**.

**Note** You must have a current *Unused* allocation of CAS in order to assign a CAS.

5

The **Online payment** screen is now displayed. Select **OK** to proceed with the transaction; this will open the Home Office's contracted third party payment service (Worldpay).







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### Online payment

You are about to be redirected to a third party online payment service to pay. Once you have paid, you will be brought back to the sponsorship management system to confirm that the CAS has been assigned. The CAS number will then be available for you to give to the student. All payments must be made in pounds sterling (£). Choose **OK** to be redirected to WorldPay or if you do not want to proceed choose **Cancel** to return to the previous screen.

The following cards will be accepted:

Electronic payments are powered by:



Payment amount	
Amount:	14



**Confirmation of Assigned CAS**

The CAS has been assigned, you should take a note of the CAS number and then give the number to the student. Choose **OK** to continue.

**Tier and category**

Tier 4 (General)

**CAS details**

CAS number:	E4G6IA7A18U0A8
Date assigned:	03/03/2014
Expiry date (use by):	04/09/2014

**Student details**

Passport number:	4757675747
Family name:	Smith
Given name(s):	Bill
Nationality:	ANDORRA
Date of birth:	29/05/1942
Course start date:	27/08/2014
Course title:	Maths

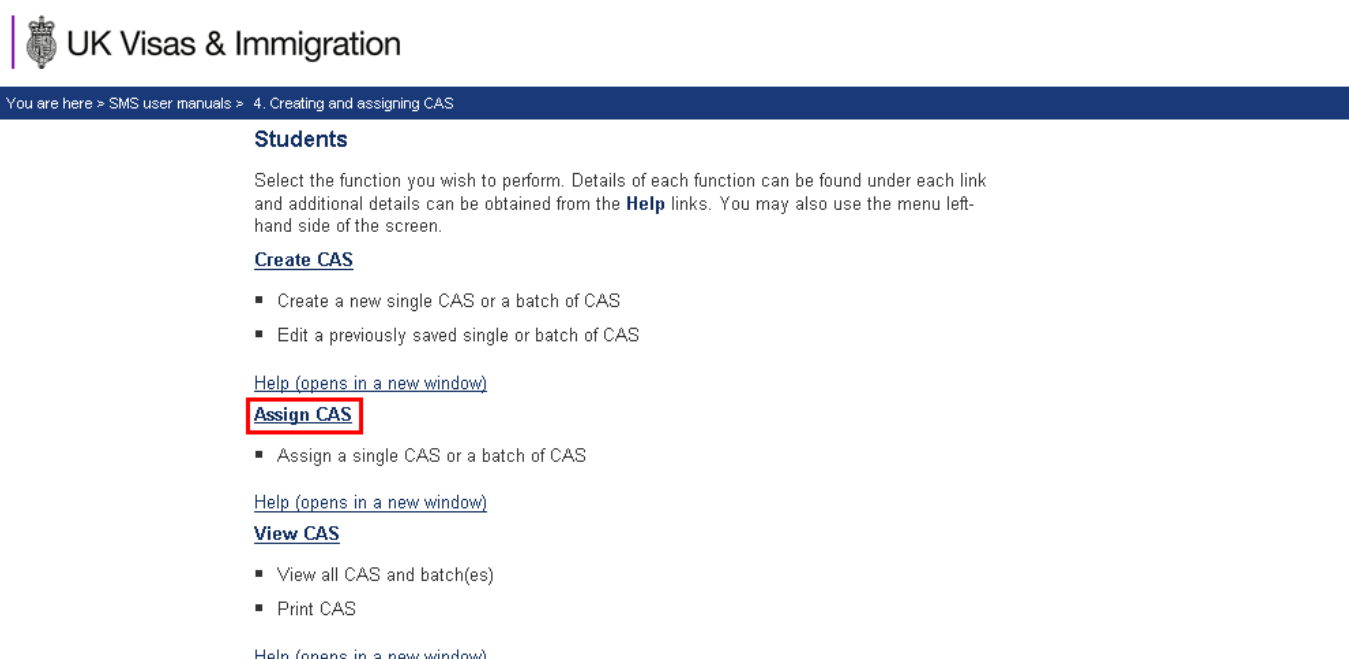
**OK**

**6** The CAS has been assigned and you can now see the unique CAS number.

## Guide 5: How to assign a batch (having created it earlier)

Follow the step by step instructions to assign a batch of CAS, without first creating it. This function is useful if you have previously created a batch of CAS and you now wish to assign and pay for it.

You should read the [Sponsorship policy guidance](#) and [SMS guide 4a – Creating a CAS – guide for education sponsors](#) before assigning batches of CAS.

Step	Instruction	Screen example
1	From the <b>Students</b> screen, select <b>Assign CAS</b> .	 <p>The screenshot shows the 'UK Visas &amp; Immigration' website. The breadcrumb trail is 'You are here &gt; SMS user manuals &gt; 4. Creating and assigning CAS'. The main heading is 'Students'. Below it, there is a paragraph: 'Select the function you wish to perform. Details of each function can be found under each link and additional details can be obtained from the <b>Help</b> links. You may also use the menu left-hand side of the screen.' There are two main sections: 'Create CAS' and 'View CAS'. Under 'Create CAS', there are two bullet points: 'Create a new single CAS or a batch of CAS' and 'Edit a previously saved single or batch of CAS'. Below this is a 'Help (opens in a new window)' link. The 'Assign CAS' link is highlighted with a red box. Under 'View CAS', there are two bullet points: 'View all CAS and batch(es)' and 'Print CAS'. Below this is another 'Help (opens in a new window)' link.</p>

2 From the **Assign CAS** screen, select **Assign batch**.

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### Assign CAS

Choose from the menu below either to assign a single CAS or assign a batch of CAS.

**Assign single CAS**

- Find and assign a single CAS

[Help \(opens in a new window\)](#)

**Assign batch**

- Find and assign a batch of CAS

[Help \(opens in a new window\)](#)

3 From the **Search for batches of CAS to assign** screen, enter the name of the batch you wish to assign, then select **Next**.

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### Search for batches of CAS to assign

Enter your search criteria to find a batch of CAS you would like to assign and choose **Next** or choose **Back** to return to the previous screen.

This search will only retrieve batch(es) that contain CAS that have a status of **Ready to go**.

**Batch search criteria**

Batch name:

Category:

Owner:


Batch created from:

Batch created to:

[Help \(opens in a new window\)](#)

**Note** If your search parameters are not specific, you will be presented with a long list of batches. This screen is not featured in this guide. Select the batch you wish to assign. If your search parameters are specific, you will be presented with the screen below.

4 From the **Confirm assignment of batch** screen, select **Assign**.

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### Confirm assignment of batch

Confirm that you would like to assign the batch by choosing **Assign**. You will need to have enough CAS remaining in your allocation to cover the whole batch to continue. If you do not want to continue choose **Cancel** to return to the **Assign CAS - search** screen.

#### Current allocation details

Allocation details

Tier and category:	Tier 4 (General)
Limit:	100
Unused:	97

#### Batch details

Batch name:	SMS guides
Number of CAS in batch:	1

5

From the **Online payment** screen, choose **OK** then proceed through the payment process.

When you have completed payment, the **Confirmation of Assigned CAS** screen is displayed.

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### Online payment

You are about to be redirected to a third party online payment service to pay. Once you have paid, you will be brought back to the sponsorship management system to confirm that the CAS has been assigned. The CAS number will then be available for you to give to the student. All payments must be made in pounds sterling (£). Choose **OK** to be redirected to WorldPay or if you do not want to proceed choose **Cancel** to return to the previous screen.

The following cards will be accepted:

Electronic payments are powered by:

**Payment amount**

Batch name:	SMS guides
Number of CAS in batch:	1
Amount:	14

**Cancel** **OK**

6

On the **Confirmation of assigned batch**, the batch has now been assigned.

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### Confirmation of assigned batch

The batch has been assigned successfully. The batch contents are displayed alphabetically. If this is a very large batch of CAS, not all CAS may be displayed. If this is the case, use the export CAS function for a full list. You should now give the CAS numbers to the students. Choose **OK** to continue.

**Batch details**

Batch name:	SMS guides
Number of CAS in batch:	1

**CAS summary**

CAS number	Family name	Given name	Date of birth	Nationality	Passport number	Course start date
E4G6IA7A18VDA5	Smith	Terry	24/03/1942	BOLIVIA	687686867867	25/03/2014

**OK**

