



Bulk Data Transfer – frequently asked questions valid from 12 November 2015

1. What is Bulk Data Transfer?

Bulk Data Transfer (BDT) is a facility that allows you (the sponsor) to transfer data in bulk from your own student records to the Sponsorship Management System (SMS). There are four BDT functions:

- bulk CAS data upload
- bulk CAS data export
- bulk data reporting
- bulk update of fees data

2. What is a bulk data upload?

Bulk data upload is the function of SMS that allows an authorised user of SMS to upload an XML file created on your own internal system to SMS, to pre-populate the fields required to create CAS. The upload process automatically creates CAS, removing the need to manually enter the data to create CAS one by one. After the data has been uploaded successfully you must make an electronic payment to assign the CAS to prospective students.

3. What is a bulk data export?

Bulk data export is the function of SMS that allows you to export Confirmations of Acceptance for Studies (CAS) numbers and the status of those CAS from the SMS, in order for you to feed this data back to your own internal systems. This enables you to update records in your own system using the CAS number assigned in the SMS. This function also allows you to download a set of CAS data based upon a number of search criteria such as; course / curriculum title, course start / end dates or status of CAS (such as “Assigned” or “Used” for example).”

4. What is bulk data reporting?

There is a duty on registered sponsors to report students who have used a Confirmations of Acceptance for Studies (CAS) from your institution but who have not enrolled within an acceptable period.

Bulk data reporting allows you to fulfil this duty by uploading a single data file generated from your own internal systems that reports on multiple Confirmations of Acceptance for Studies (CAS) generated from your own internal systems. If you do not wish to use the bulk data transfer facility to report non-enrolment, you can still use SMS to submit reports on an individual basis.

Please note that other reporting responsibilities, such as reporting that you have stopped sponsoring students, are not included as part of the bulk data transfer facility. Therefore, you will always need to report these events using the SMS on an individual basis.

5. How does bulk data transfer work?

Files are transferred between your student record IT system and SMS across the internet using the Secure Sockets Layer (SSL) protocol. You must be logged into SMS to facilitate this.

6. Is this an interface similar to how some education providers send files to UCAS?

No. This is a facility to upload and export files in a specified format. It is not an automated interface; the upload and export of files will need to be performed manually by a logged on SMS user.

7. In what format does the information in the Bulk Data Transfer files have to be?

The data that is transferred between your IT systems and SMS must conform to the XML Specification Document (XSD), which contains the rules and validations governing how the data must be formatted when it leaves your IT systems or SMS. The XSD contains two specifications; one for Tier 4 (General) and one for Tier 4 (Child). The data will not transfer if it is not in the correct format.

8. In what format do the Bulk Data Transfer files have to be?

The bulk data is transferred in an Extended Markup Language (XML) data file contained within a compressed ZIP file. The ZIP file has no functional significance and is used solely as a vehicle for data compression. Only XML files are compatible with the bulk data facility; Excel or CSV files are not compatible.

9. What will happen to the file I attempt to upload if it is rejected?

If the file you attempt to upload contains errors it will be rejected and none of the data will be uploaded to SMS.

10. Why would a file be rejected?

There are numerous reasons why a file could be rejected. These include a file exceeding the maximum number of permitted CAS in a batch, duplicate records, invalid dates, or incorrectly formatted data, such as a UK postcode. Sponsors are advised to run their files through a validation tool before attempting an upload.

11. Can I send more than one zipped file in a single Bulk Data Transfer?

Bulk data transfer will only process a single data file (single XML file within a single ZIP file) as part of any business operation, whether data upload or download. Any attempt to upload multiple ZIP files or a ZIP file with multiple XML files inside at any one time will be automatically rejected. You can include up to a thousand CAS records in a single XML file. You may, however, upload several single zipped XML files in to a batch, one at a time; the maximum number of records per batch is 10,000.

12. Do I have to use Bulk Data Transfer?

No. There is no requirement to use the Bulk Data Transfer facility. It was introduced to enable sponsors who anticipate that they will issue large numbers of Confirmation/s of Acceptance of Studies (CAS) to do so more easily than creating them one at a time. Everything that the Bulk Data Transfer facility enables you to do in bulk and will be possible for individual CAS using the Sponsorship Management System (SMS).

13. I have a problem in applying the XML Specification Document (XSD) to my internal student system; what support is available?

Implementing the XSD may involve changes to your own IT system(s); as such the primary route for implementation enquiries should be your own technical implementation support services. If your own technical support staff are unable to assist in your enquiry and it is not addressed in these Frequently Asked Questions, you can contact us at EducatorsHelpdesk@homeoffice.gsi.gov.uk.

You should ensure that your email clearly explains the problem you are experiencing, and contains 'Bulk Data Transfer implementation toolkit query' in the subject line. It would also be useful to include any error messages you have received.

14. What is Bulk Data Fees Upload?

This allows the sponsor to update student fee-related data on assigned CAS in the Sponsorship Management System (SMS) via bulk upload, in the format of a zipped XML file which will operate in a similar way to that used for bulk CAS data upload.

15. What fee-related data can be uploaded?

Fees data will need to be provided for all four fields at the same time, even if a value for one or more fields is “nil”:

- Course fees for the first year
- Course fees paid to date
- Boarding fees paid to date
- Accommodation fees paid to date

16. What is the purpose of bulk fees update?

We appreciate that when a sponsor is completing a CAS for assignment to a student the full fee details may not be available or known at the time and may not be known until after the CAS has actually been assigned. This facility therefore allows a sponsor to record the most up to date fee details after a CAS has been assigned, so that an immigration application using that CAS can be properly assessed.

17. When can I update the fees?

The bulk upload of fees can be used at any time after the CAS has been assigned and has a status of Assigned or Expired, but not once the CAS has been ‘Used’.

18. Do I need to update all four fields at the same time?

All four fields for update of the fees record will need to be provided for each Confirmation of Acceptance for Studies (CAS) to be updated and will overwrite any existing data in these fields. No fees history is stored in PBS; only the latest values provided.

21. What is a country code?

The country code states which three letter codes are accepted into the Sponsorship Management System (SMS) and the country name to which the code represents. The codes are based on ISO 3166 –1 Alpha 3 codes and are widely used.

22. Why don't the country codes cover all countries?

The countries listed are those recognised as passport issuing countries by the Foreign and Commonwealth Office (FCO).

23. British National Overseas and British Overseas Citizen are not listed; what nationality do I enter?

The country of which the individual is a national should be entered.

24. Where can I find further information about the Sponsorship Management System (SMS)?

Further information on using the SMS and guides for completing CoS and CAS can be obtained from a range of area-specific SMS user guides on the GOV.UK website (alongside this document), at:

<https://www.gov.uk/government/collections/sponsorship-information-for-employers-and-educators>

25. Do the Progression and Work placement justification free text fields have a word limit?

Both of these text fields have a character limit of 1000.

26. What support is there for me after reading the toolkit but the transfer is still unsuccessful?

Customers should approach their IT provider or specialist before contacting the Home Office. The BDT product is only recommended for experienced xml users. However, if problems persist, you can contact us at: EducatorsHelpdesk@homeoffice.gsi.gov.uk.

You should ensure that your email clearly explains the problem you are experiencing and contains 'Bulk Data Transfer implementation toolkit query' in the subject line. It would also be useful to include any error messages you have received, as well as screenshots indicating the nature of the problem or problems.

Changes to Secure English Language Test (SELT) Providers

27. What changes have been made to the list of SELT providers?

Due to regulatory changes earlier in 2015, the following four values were removed from the list of valid SELT providers in November 2015:

Title	Code
Cambridge English Language Assessment	CAMB_ESOL
City and Guilds	CANDG
Pearson	PEARSON
Trinity (pre-6 April 2015 tests)	TCL