



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 a supplementary policy manual for completing a 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	Introduction to SMS	Common	Use this manual to log into SMS, change your password, manage SMS users and view important messages posted by the Home Office. 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.	All sponsors
Manual 2	Managing your licence	Common	To help sponsors manage their key personnel, change their licence details, manage PAYE references, and apply for allocations of CoS/CAS.	All sponsors
Manual 3	Apply for Premium customer service, Basic Compliance Assessment and manage Action plans	Common	To help sponsors apply for Premium customer service, Basic Compliance Assessment and manage action plans.	All sponsors

Manual reference	Manual title	Type	Purpose	Audience
Manual 4	Creating and assigning CAS	CAS	To help sponsors create and assign individual and batches of CAS.	Sponsors licensed in the Student Route
Manual 4a	Creating a CAS – guide for education sponsors	CAS	This manual 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 the Student Route
Manual 5	Reporting student activity	CAS	To help sponsors report student activity, for example if a student's circumstances change or submitting a graduate notification. This manual also contains help with reporting fee updates and adding sponsor notes to CAS that have already been assigned.	Sponsors licensed in the Student Route
Manual 6	Miscellaneous CAS functions	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 the Student Route
Manual 7	Bulk Data Transfer of CAS	CAS	To help sponsors use the bulk data transfer (BDT) functions of SMS, including graduate notifications. You must have a bespoke IT system in place to use BDT.	Sponsors licensed in the Student Route

Manual reference	Manual title	Type	Purpose	Audience
Manual 8	Creating and assigning CoS	CoS	To help sponsors create and assign individual and batches of CoS.	Sponsors licensed in any Worker or Temporary Worker route
Manual 9	Reporting worker activity	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 Worker or Temporary Worker route
Manual 10	Miscellaneous CoS functions	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 Worker or Temporary Worker route

Manual reference	Manual title	Type	Purpose	Audience
Manual 11	Temporary Work – Creative Worker Group of CoS	CoS	To help sponsors create and manage groups of CoS. Groups of CoS are only available to sponsors licensed in Temporary Work - Creative Worker	Sponsors licensed in the Temporary Work - Creative Work Route
Manual 12	Defined CoS	CoS	To help sponsors apply for defined CoS, track applications for defined CoS and once granted, create defined CoS.	Sponsors licensed in Skilled Worker

Glossary

Term	Meaning
SMS	Sponsorship Management System
CoS	Certificate of Sponsorship
CAS	Confirmation of Acceptance for Studies
AO	Authorising Officer
KC	Key Contact
BDT	Bulk Data Transfer
SELT	Secure English Language Test
.XML	Extensible Mark-up Language
.PDF	Portable Document Format
Automation	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.

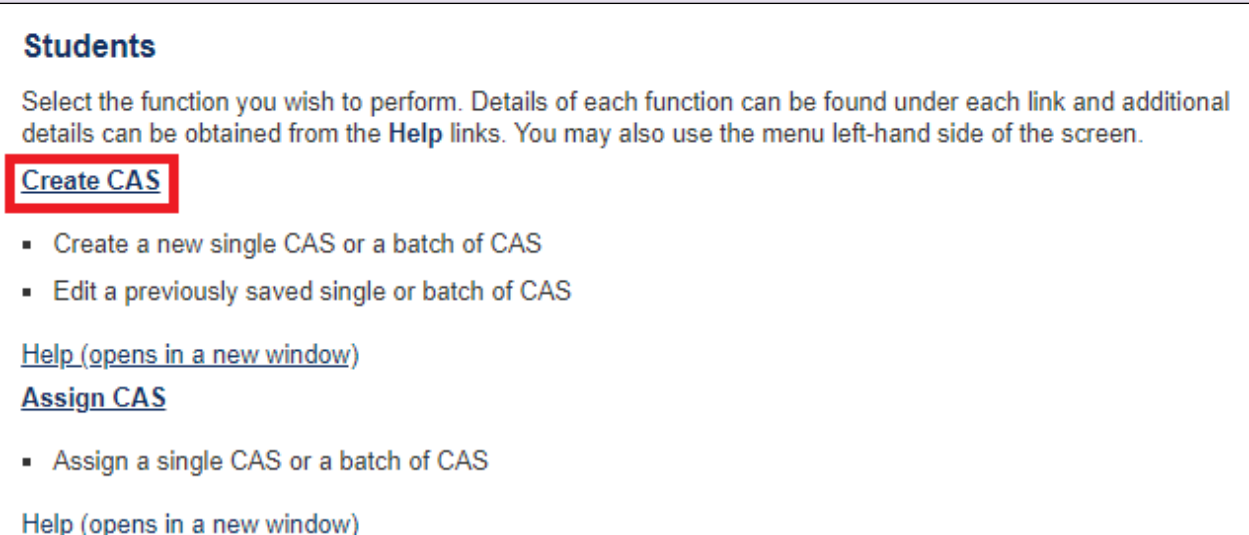
As seen in SMS	Meaning
WORK IN PROGRESS	The CAS is still 'in draft' as one or more mandatory fields are yet to be completed.
READY TO GO	All mandatory fields are complete and the CAS is ready to be assigned to an individual.
ASSIGNED	The CAS has been assigned to an individual in SMS and is ready to be 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 route / your whole licence prior to the CAS being used.

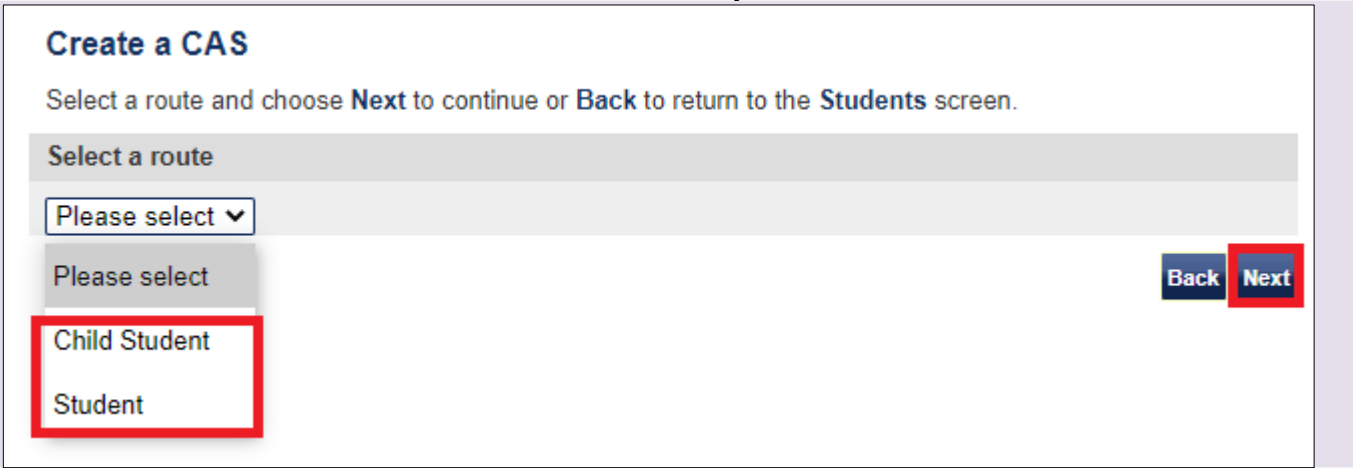
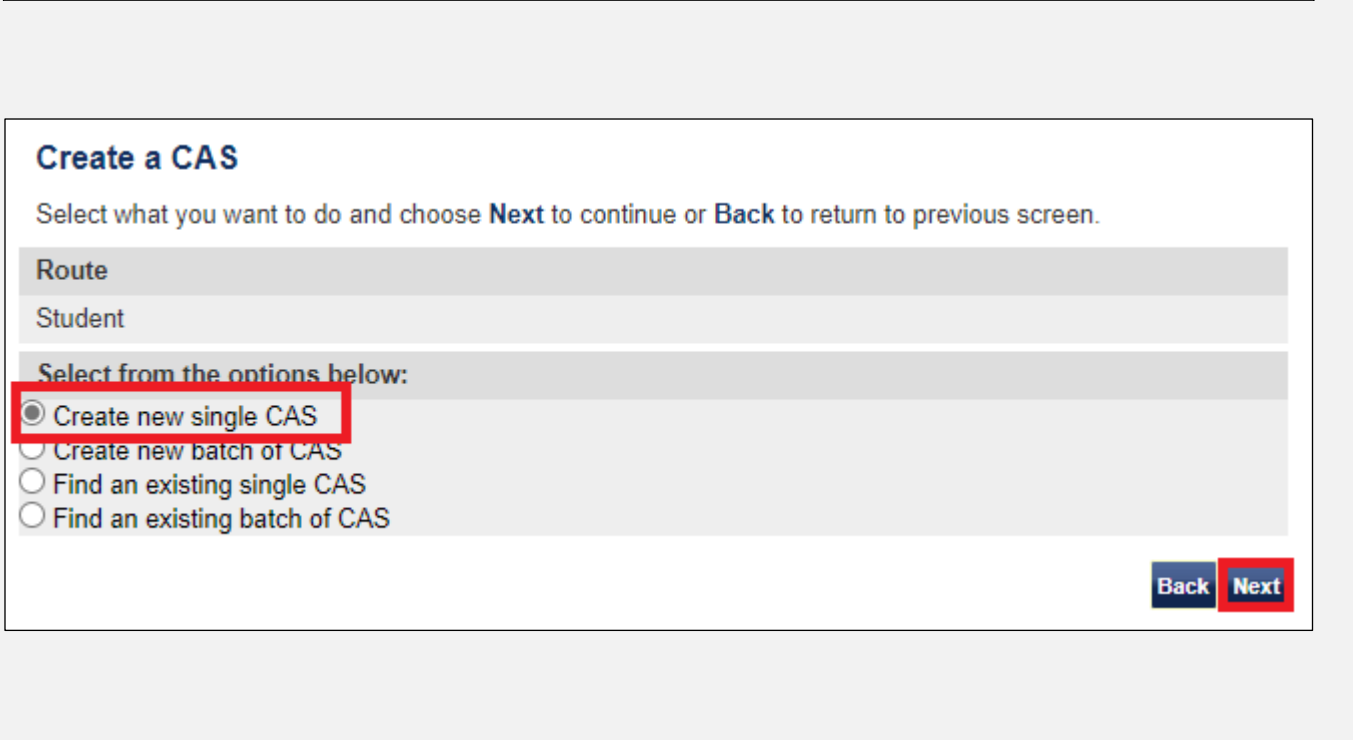
SMS guides

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 Students screen, select Create CAS .	 <p>Students</p> <p>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 Help links. You may also use the menu left-hand side of the screen.</p> <p>Create CAS</p> <ul style="list-style-type: none">▪ Create a new single CAS or a batch of CAS▪ Edit a previously saved single or batch of CAS <p>Help (opens in a new window)</p> <p>Assign CAS</p> <ul style="list-style-type: none">▪ Assign a single CAS or a batch of CAS <p>Help (opens in a new window)</p>

Step	Instruction	Screen example
2	<p>From the Create a CAS screen, select the relevant route (Student or Child Student) and choose Next.</p> <p>If you are only licensed under one of these categories, the drop-down list will default to that route and this step won't be necessary.</p>	
3	<p>From the second Create a CAS screen, select Create new single CAS and choose Next.</p>	

Step**Instruction****Screen example****4**

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

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.

Route

Student

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:	*	<input type="text"/>
Given name(s):		<input type="text"/>
Other names:		<input type="text"/>
Date of birth:	*	<input type="text"/> <input type="text"/> <input type="text"/>
Gender:	*	Please select <input type="text"/>
Nationality:	*	Please select <input type="text"/>
Place of birth:		<input type="text"/>
Help (opens in a new window)		
Country of birth:	*	Please select <input type="text"/>
Passport number:	*	<input type="text"/>
Applicant number:		<input type="text"/>
Help (opens in a new window)		
UCAS ID number:		<input type="text"/>
Help (opens in a new window)		

Offer details

Enter the course and study details of the offer that the CAS supports.

Course details

Application number:		<input type="text"/>
Help (opens in a new window)		
Course title:	*	<input type="text"/>
Help (opens in a new window)		
Course ID:		<input type="text"/>

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

Step**Instruction****Screen example****5**

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

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

Confirmation of saved CAS

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; or
- **Exit** to return to the previous screen.

Route	
Student	
Student details	
Passport number:	123456
Family name:	Smith
Given name(s):	
Nationality:	BANGLADESH
Date of birth:	17/01/1934
Course start date:	17/01/2021
Course title:	maths

Exit Link Assign Amend Delete

Note

1. If **Assign** is unavailable (greyed out), one or more mandatory fields in the CAS may not have been completed. A common reason for this is because 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.

Step	Instruction	Screen example																				
6	<p>On the Assign CAS screen, if the details displayed are correct, select Assign.</p> <p>If you need to make further changes, select Back.</p>	<p>Assign CAS</p> <p>Check the information and choose Assign to assign the CAS or choose Back to return to the previous screen.</p> <p>Current allocation details</p> <p>The current allocation you hold against the route 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.</p> <table border="1" data-bbox="797 459 2056 624"> <tr> <td>Route:</td> <td>Student</td> </tr> <tr> <td>Limit:</td> <td>100</td> </tr> <tr> <td>Unused:</td> <td>98</td> </tr> </table> <p>Student details</p> <table border="1" data-bbox="797 687 2056 1034"> <tr> <th colspan="2">Student details</th> </tr> <tr> <td>Family name:</td> <td>Smith</td> </tr> <tr> <td>Given name(s):</td> <td></td> </tr> <tr> <td>Other names:</td> <td></td> </tr> <tr> <td>Date of birth:</td> <td>17/01/1934</td> </tr> <tr> <td>Gender:</td> <td>Female</td> </tr> <tr> <td>Nationality:</td> <td>BANGLADESH</td> </tr> </table> <p>Overseas institution details (if applicable)</p> <p>None provided</p> <p style="text-align: right;"> <input type="button" value="Back"/> <input type="button" value="Assign"/> </p>	Route:	Student	Limit:	100	Unused:	98	Student details		Family name:	Smith	Given name(s):		Other names:		Date of birth:	17/01/1934	Gender:	Female	Nationality:	BANGLADESH
Route:	Student																					
Limit:	100																					
Unused:	98																					
Student details																						
Family name:	Smith																					
Given name(s):																						
Other names:																						
Date of birth:	17/01/1934																					
Gender:	Female																					
Nationality:	BANGLADESH																					
Note		<p>Your current CAS allocation is also displayed in this screen. You must have a current <i>Unused</i> allocation of CAS in order to assign a CAS. If your <i>Unused</i> 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.</p>																				

Step**Instruction****Screen example**

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.

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: 21

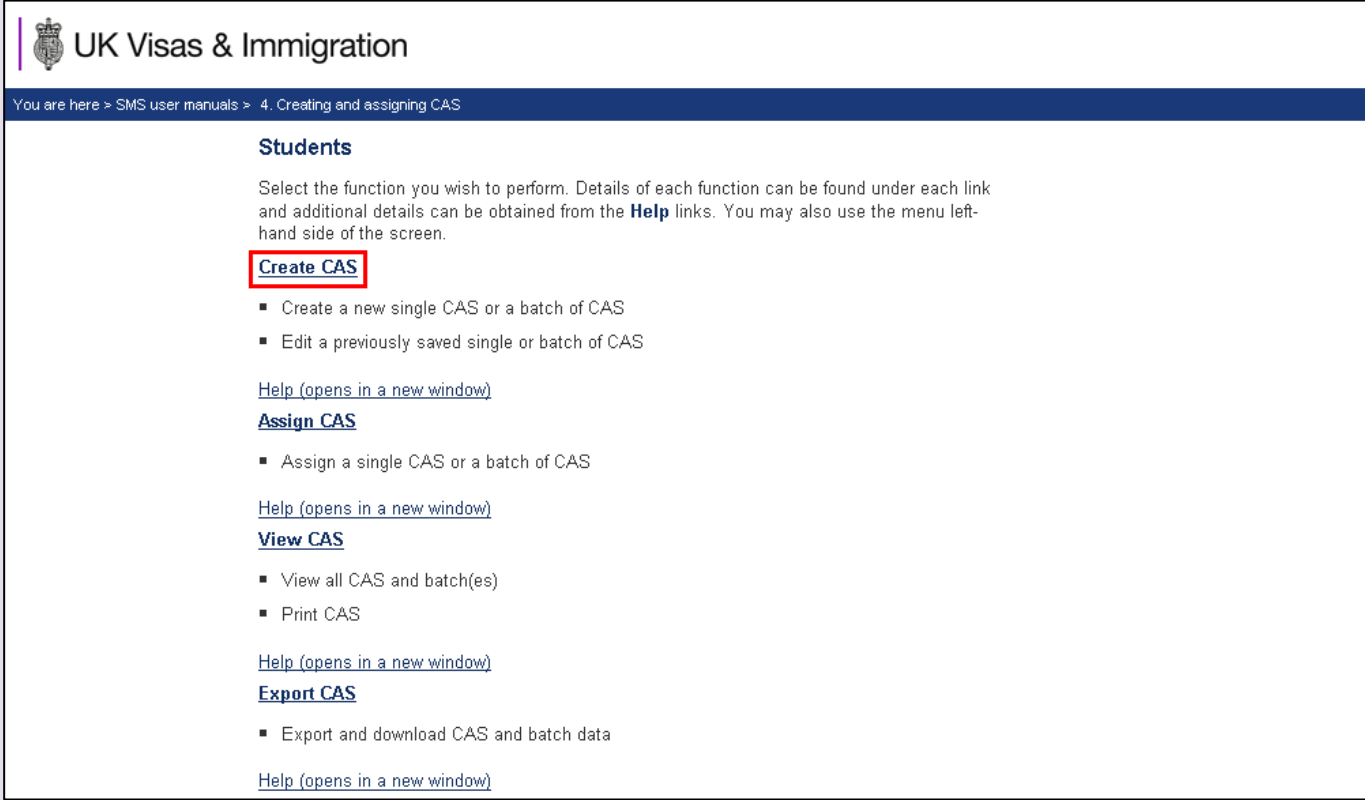
Cancel **OK**

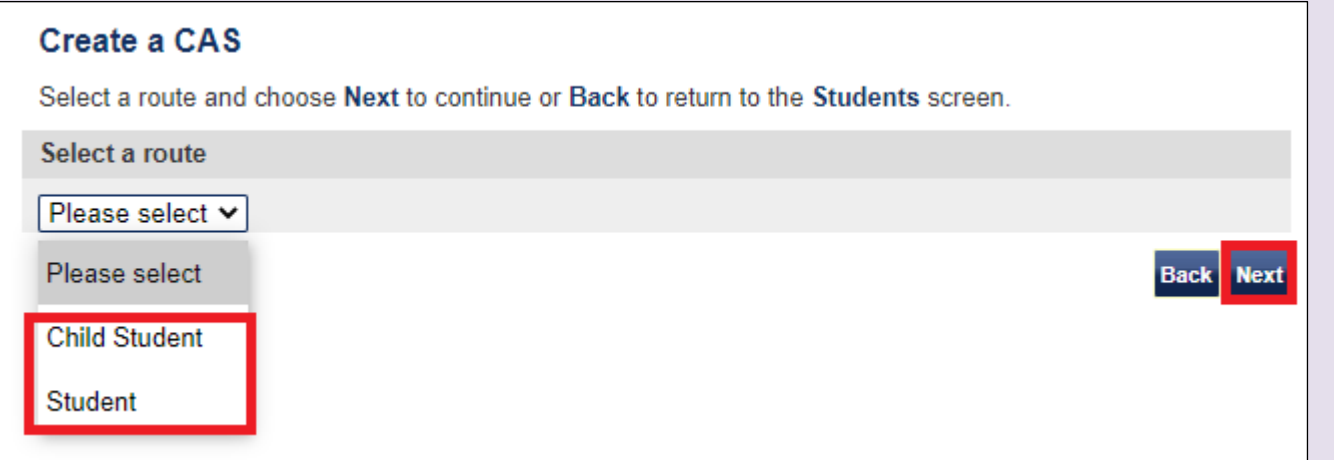
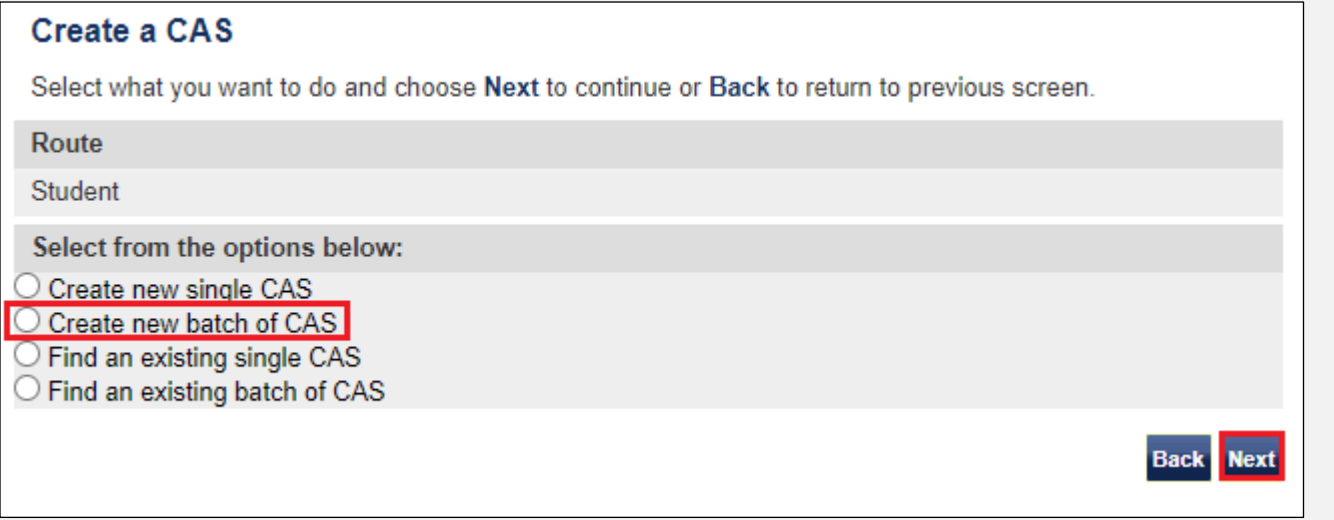
Step	Instruction	Screen example																												
8	The Confirmation of Assigned CAS , shows details of the assigned CAS.	<p data-bbox="862 172 1332 209">Confirmation of Assigned CAS</p> <p data-bbox="862 233 2056 293">The CAS has been assigned, you should take a note of the CAS number and then give the number to the student. Choose OK to continue.</p> <table border="1" data-bbox="862 316 2112 1007"> <thead> <tr> <th colspan="2" data-bbox="862 316 2112 363">Route</th> </tr> <tr> <td colspan="2" data-bbox="862 363 2112 416">Student</td> </tr> <tr> <th colspan="2" data-bbox="862 416 2112 464">CAS details</th> </tr> <tr> <td data-bbox="862 464 1377 512">CAS number:</td> <td data-bbox="1377 464 2112 512">E4G2XA2A45E0A4</td> </tr> <tr> <td data-bbox="862 512 1377 560">Date assigned:</td> <td data-bbox="1377 512 2112 560">23/11/2020</td> </tr> <tr> <td data-bbox="862 560 1377 608">Expiry date (use by):</td> <td data-bbox="1377 560 2112 608">24/05/2021</td> </tr> <tr> <th colspan="2" data-bbox="862 608 2112 655">Student details</th> </tr> <tr> <td data-bbox="862 655 1377 703">Passport number:</td> <td data-bbox="1377 655 2112 703">123456</td> </tr> <tr> <td data-bbox="862 703 1377 751">Family name:</td> <td data-bbox="1377 703 2112 751">Smith</td> </tr> <tr> <td data-bbox="862 751 1377 799">Given name(s):</td> <td data-bbox="1377 751 2112 799"></td> </tr> <tr> <td data-bbox="862 799 1377 847">Nationality:</td> <td data-bbox="1377 799 2112 847">BANGLADESH</td> </tr> <tr> <td data-bbox="862 847 1377 895">Date of birth:</td> <td data-bbox="1377 847 2112 895">17/01/1934</td> </tr> <tr> <td data-bbox="862 895 1377 943">Course start date:</td> <td data-bbox="1377 895 2112 943">17/01/2021</td> </tr> <tr> <td data-bbox="862 943 1377 1007">Course title:</td> <td data-bbox="1377 943 2112 1007">maths</td> </tr> </thead></table> <p data-bbox="2056 1018 2112 1078">OK</p>	Route		Student		CAS details		CAS number:	E4G2XA2A45E0A4	Date assigned:	23/11/2020	Expiry date (use by):	24/05/2021	Student details		Passport number:	123456	Family name:	Smith	Given name(s):		Nationality:	BANGLADESH	Date of birth:	17/01/1934	Course start date:	17/01/2021	Course title:	maths
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Date of birth:	17/01/1934																													
Course start date:	17/01/2021																													
Course title:	maths																													

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 Students screen, select Create CAS .	 <p>The screenshot shows the 'UK Visas & Immigration' website. The breadcrumb trail is 'You are here > SMS user manuals > 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 Help 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 is a list of 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 'Export CAS', each followed by a list of bullet points and a 'Help (opens in a new window)' link.</p>

Step	Instruction	Screen example
2	<p>From the Create a CAS screen, select the relevant route (Student or Child Student) and choose Next.</p> <p>If you are only licensed under one of these categories, the drop-down list will default to that route and this step won't be necessary.</p>	 <p>Create a CAS</p> <p>Select a route and choose Next to continue or Back to return to the Students screen.</p> <p>Select a route</p> <p>Please select ▼</p> <p>Please select</p> <p>Child Student</p> <p>Student</p> <p>Back Next</p>
3	<p>From the second Create a CAS screen, select Create new batch of CAS and Next.</p>	 <p>Create a CAS</p> <p>Select what you want to do and choose Next to continue or Back to return to previous screen.</p> <p>Route</p> <p>Student</p> <p>Select from the options below:</p> <p><input type="radio"/> Create new single CAS</p> <p><input checked="" type="radio"/> Create new batch of CAS</p> <p><input type="radio"/> Find an existing single CAS</p> <p><input type="radio"/> Find an existing batch of CAS</p> <p>Back Next</p>

Step**Instruction****Screen example****4**

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

Create a CAS

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

Route

Student

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**

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

Step**Instruction****Screen example****5**

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

Batch details

A maximum of 100 CAS will be displayed on this screen. 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 using bulk data transfer (BDT);
- **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; or
- **Assign** to pay for and assign the batch. All CAS must have a status of **Ready to go** to assign the batch.

Route

Student

Batch details

Batch name: *

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

Number of CAS in batch: 0

Owner: test, test (HdcozV)

Status: WORK IN PROGRESS

Date created: 23/11/2020

Details of CAS within batch

CAS status	Family name	Given name	Date of birth	Nationality	Passport number	Course start date

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

Step	Instruction	Screen example
<p data-bbox="174 758 203 786">6</p> <p data-bbox="259 719 723 826">From the Create a CAS screen, complete the student details and course details then select Save.</p>		<div data-bbox="981 150 2184 1391"> <h3 data-bbox="987 161 1151 185">Create a CAS</h3> <p data-bbox="987 209 1935 284">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.</p> <p data-bbox="987 300 1935 320">If you are editing a previously saved CAS, the option to choose to Delete the CAS will also be available.</p> <div data-bbox="987 344 1980 419"> <p data-bbox="987 344 1048 368">Route</p> <p data-bbox="987 384 1061 408">Student</p> </div> <div data-bbox="987 432 1980 507"> <p data-bbox="987 432 1122 456">Batch details</p> <p data-bbox="987 472 1532 496">Batch name: Test Batch</p> </div> <div data-bbox="987 520 1980 635"> <p data-bbox="987 520 1173 544">Student details</p> <p data-bbox="987 568 1899 616">Enter the details of the student to which you want to assign the CAS. Where applicable, complete the information as shown in their passport.</p> </div> <div data-bbox="987 639 1980 1238"> <p data-bbox="987 639 1137 663">Student details</p> <p data-bbox="987 679 1659 703">Family name: * <input type="text"/></p> <p data-bbox="987 719 1659 743">Given name(s): <input type="text"/></p> <p data-bbox="987 759 1659 783">Other names: <input type="text"/></p> <p data-bbox="987 799 1733 823">Date of birth: * <input type="text"/> <input type="text"/> <input type="text"/></p> <p data-bbox="987 839 1585 863">Gender: * <input type="text" value="Please select"/></p> <p data-bbox="987 879 1677 935">Nationality: * <input type="text" value="Please select"/></p> <p data-bbox="987 943 1659 967">Place of birth: <input type="text"/></p> <p data-bbox="987 975 1263 999">Help (opens in a new window)</p> <p data-bbox="987 1007 1570 1062">Country of birth: * <input type="text" value="Please select"/></p> <p data-bbox="987 1070 1659 1094">Passport number: * <input type="text"/></p> <p data-bbox="987 1110 1659 1134">Applicant number: <input type="text"/></p> <p data-bbox="987 1142 1263 1166">Help (opens in a new window)</p> <p data-bbox="987 1174 1659 1198">UCAS ID number: <input type="text"/></p> <p data-bbox="987 1206 1263 1230">Help (opens in a new window)</p> </div> <div data-bbox="987 1254 1980 1342"> <p data-bbox="987 1254 1137 1278">Offer details</p> <p data-bbox="987 1302 1608 1326">Enter the course and study details of the offer that the CAS supports.</p> </div> <div data-bbox="987 1350 1980 1391"> <p data-bbox="987 1350 1137 1374">Course details</p> </div> </div>

Step**Instruction****Screen example**

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**.

Batch details

A maximum of 100 CAS will be displayed on this screen. 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 using bulk data transfer (BDT);
- **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; or
- **Assign** to pay for and assign the batch. All CAS must have a status of **Ready to go** to assign the batch.

Route

Student

Batch details

Batch name: *

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

Number of CAS in batch: 1

Owner: test, test (HdcozV)

Status: READY TO GO

Date created: 23/11/2020

Upload Add pre-populated CAS Add CAS Save batch details

Details of CAS within batch

	CAS status	Family name	Given name	Date of birth	Nationality	Passport number	Course start date
Unlink Edit	READY TO GO	Taylor		18/12/1938	AUSTRALIA	4321	18/12/2020

Upload Add pre-populated CAS Add CAS

Exit Delete all Assign

Step**Instruction****Screen example****8**

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

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

Route:	Student
Limit:	100
Unused:	97

Batch details

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

Cancel **Assign**

Step**Instruction****Screen example****9**

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

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: 21

Cancel **OK**

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**.

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 Batch2
 Number of CAS in batch: 1

CAS summary

CAS number	Family name	Given name	Date of birth	Nationality	Passport number	Course start date
E4G2XA2A46G0A5	Taylor		19/12/1938	ARGENTINA	00000	19/12/2020

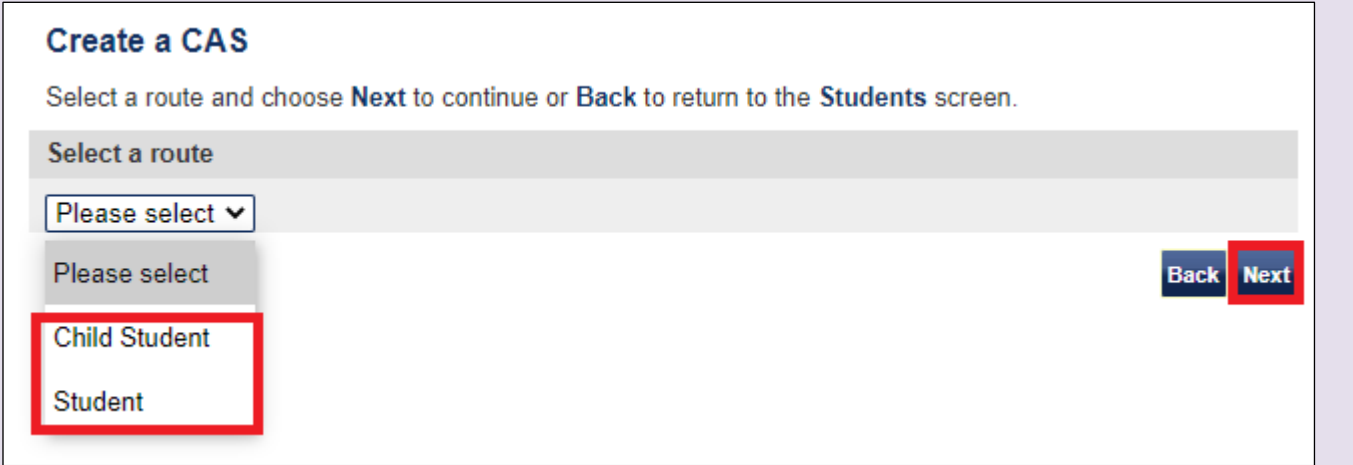
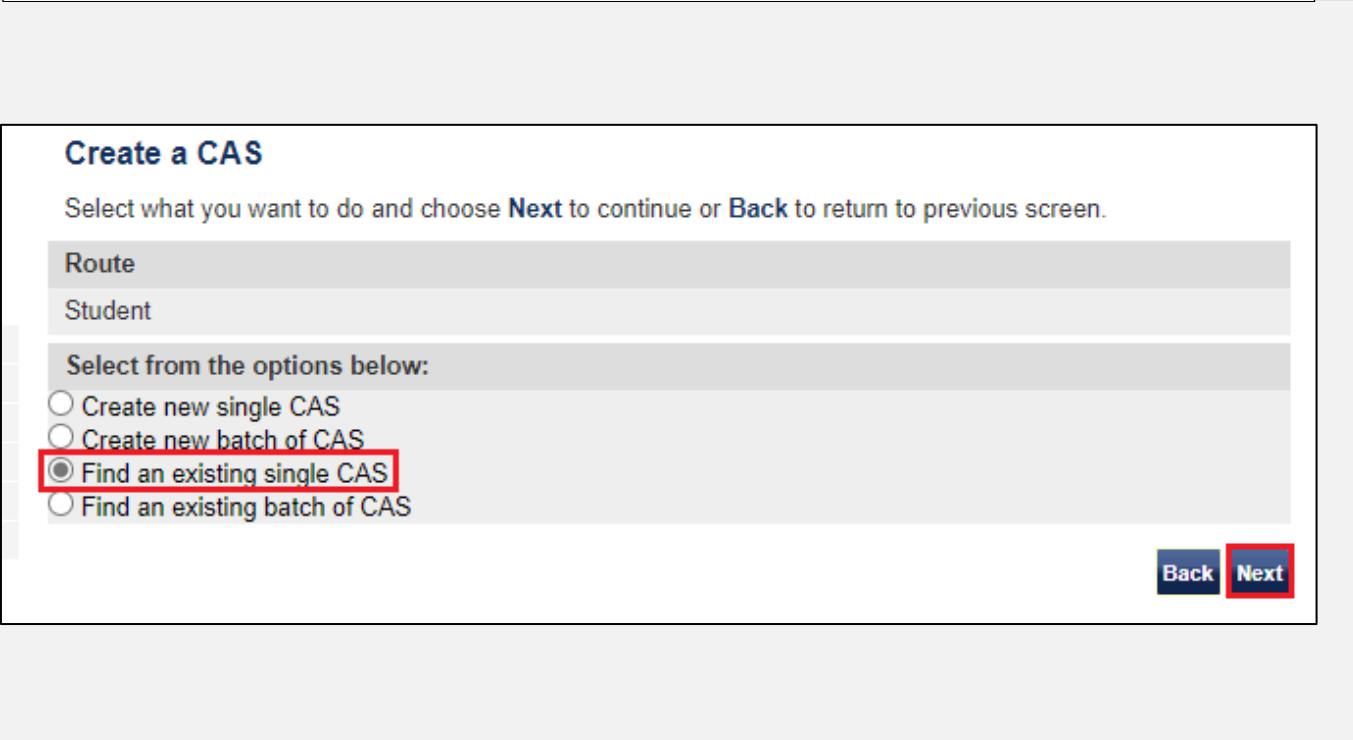
OK

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 Student screen, select Create CAS .	 <p>The screenshot shows the 'UK Visas & Immigration' interface. At the top, there is a breadcrumb trail: 'You are here > SMS user manuals > 4. Creating and assigning CAS'. Below this, the 'Students' section is titled, followed by 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 Help 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'. Further down, the 'View CAS' section has two bullet points: 'View all CAS and batch(es)' and 'Print CAS', with another 'Help (opens in a new window)' link. The 'Export CAS' section has one bullet point: 'Export and download CAS and batch data', with a final 'Help (opens in a new window)' link.</p>

Step	Instruction	Screen example
2	<p>From the Create a CAS screen, select the relevant route (Student or Child Student) and choose Next.</p> <p>If you are only licensed under one of these categories, the drop-down list will default to that route and this step won't be necessary.</p>	
3	<p>From the second Create a CAS screen, select Find an existing single CAS and then Next.</p>	

Step**Instruction****Screen example****4**

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

Create a CAS

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

Route

Student

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.

Step**Instruction****Screen example**

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

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

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.

Route

Student

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: *

Nationality: *

Place of birth:

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

Country of birth: *

Passport number: *

Applicant number:

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

Overseas institution details (if applicable)

Overseas higher education institution name:

Pre-stored address:

Provide address

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

Cancel Delete Save

Step	Instruction	Screen example																				
	<p><i>After editing:</i></p> <p>6 From the Confirmation of saved CAS screen, you can see the amended details.</p>	<div data-bbox="857 169 1290 204"> <h3>Confirmation of saved CAS</h3> </div> <p data-bbox="857 229 1245 260">From the options below, choose:</p> <ul data-bbox="857 285 2096 539" style="list-style-type: none"> ▪ 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; or ▪ Exit to return to the previous screen. <div data-bbox="857 552 2123 1043"> <table border="1"> <thead> <tr> <th colspan="2" data-bbox="857 552 2123 600">Route</th> </tr> </thead> <tbody> <tr> <td data-bbox="857 600 2123 647">Student</td> <td></td> </tr> <tr> <th colspan="2" data-bbox="857 647 2123 695">Student details</th> </tr> <tr> <td data-bbox="857 695 2123 743">Passport number:</td> <td></td> </tr> <tr> <td data-bbox="857 743 2123 791">Family name:</td> <td data-bbox="1379 759 1464 791">Smith</td> </tr> <tr> <td data-bbox="857 791 2123 839">Given name(s):</td> <td></td> </tr> <tr> <td data-bbox="857 839 2123 887">Nationality:</td> <td data-bbox="1379 855 1514 887">ARMENIA</td> </tr> <tr> <td data-bbox="857 887 2123 935">Date of birth:</td> <td></td> </tr> <tr> <td data-bbox="857 935 2123 983">Course start date:</td> <td></td> </tr> <tr> <td data-bbox="857 983 2123 1031">Course title:</td> <td></td> </tr> </tbody> </table> </div> <div data-bbox="1720 1062 2123 1110"> <p>Exit Link Assign Amend Delete</p> </div>	Route		Student		Student details		Passport number:		Family name:	Smith	Given name(s):		Nationality:	ARMENIA	Date of birth:		Course start date:		Course title:	
Route																						
Student																						
Student details																						
Passport number:																						
Family name:	Smith																					
Given name(s):																						
Nationality:	ARMENIA																					
Date of birth:																						
Course start date:																						
Course title:																						

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 Students screen, select Assign CAS .	 <p>The screenshot shows the 'UK Visas & Immigration' website. The breadcrumb trail is 'You are here > SMS user manuals > 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 Help links. You may also use the menu left-hand side of the screen.' There are three main sections: 'Create CAS', 'Assign CAS', and 'View CAS'. The 'Assign CAS' section is highlighted with a red box. It contains a list: 'Assign a single CAS or a batch of CAS'. There are also 'Help (opens in a new window)' links for each section.</p>

Step**Instruction****Screen example****2**

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

3

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

Step**Instruction****Screen example****4**

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

UK Visas & Immigration

You are here > SMS user manuals > 4. Creating and assigning CAS

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

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

Back **Assign**

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

Step**Instruction****Screen example****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).

UK Visas & Immigration

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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:

VISA VISA MasterCard Maestro AMERICAN EXPRESS GOLD

Electronic payments are powered by:

payments powered by **WorldPay**


Payment amount

Amount: 14

Cancel OK

Step**Instruction****Screen example****6**

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

 **UK Visas & Immigration**

You are here > SMS user manuals > 4. Creating and assigning CAS

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

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 Students screen, select Assign CAS .	 <p>The screenshot shows the 'UK Visas & Immigration' website. The breadcrumb trail is 'You are here > SMS user manuals > 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 Help 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>

Step**Instruction****Screen example****2**

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

UK Visas & Immigration

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

Back **Next**

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.

Step**Instruction****Screen example****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

Cancel **Assign**

Step**Instruction****Screen example****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**

Step**Instruction****Screen example****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
E4G6IA7A18V0A5	Smith	Terry	24/03/1942	BOLIVIA	687686867867	25/03/2014

OK