The sponsorship management system (SMS) manuals

Step by step guide for sponsors

Manual 9 of 12: Reporting worker activity

Contents

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Additional SMS manuals

There are 12 SMS manuals available, plus a supplementary policy guide 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

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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. 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

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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	[Tier 5 Creative and Sporting groups of CoS](#)	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 the Temporary Worker - Creative and Sporting route
Manual 12	[Defined CoS](#)	CoS	To help sponsors apply for defined CoS, track applications for defined CoS and once granted, create defined CoS.	Sponsored 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 organisation address, or the address of your AO and KC. We will write to you if you meet the criteria and automation has been set.

CoS status

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

As seen in SMS	Meaning
WORK IN PROGRESS	The CoS is still in 'draft' form as one or more mandatory details have yet to be completed.
READY TO GO	All mandatory fields are complete and the CoS is ready to be assigned to an individual.
ASSIGNED	The CoS has been assigned to an individual and is ready to be used in support of an application for leave to enter or remain.
WITHDRAWN	You have used the 'Manage live CoS' function to withdraw the CoS.
USED	The CoS has been used in support of an individual's application for leave to enter or remain.
EXPIRED	EITHER: The individual has not made an application for leave to enter or remain by the expiry date of the CoS. A new CoS is required; OR: The individual has applied by the CoS expiry date but we have not considered their application before that date. In this case, no action is required on your part; we will change the status of the CoS from EXPIRED to USED when the application is considered.
CANCELLED	The CoS 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 CoS being used.

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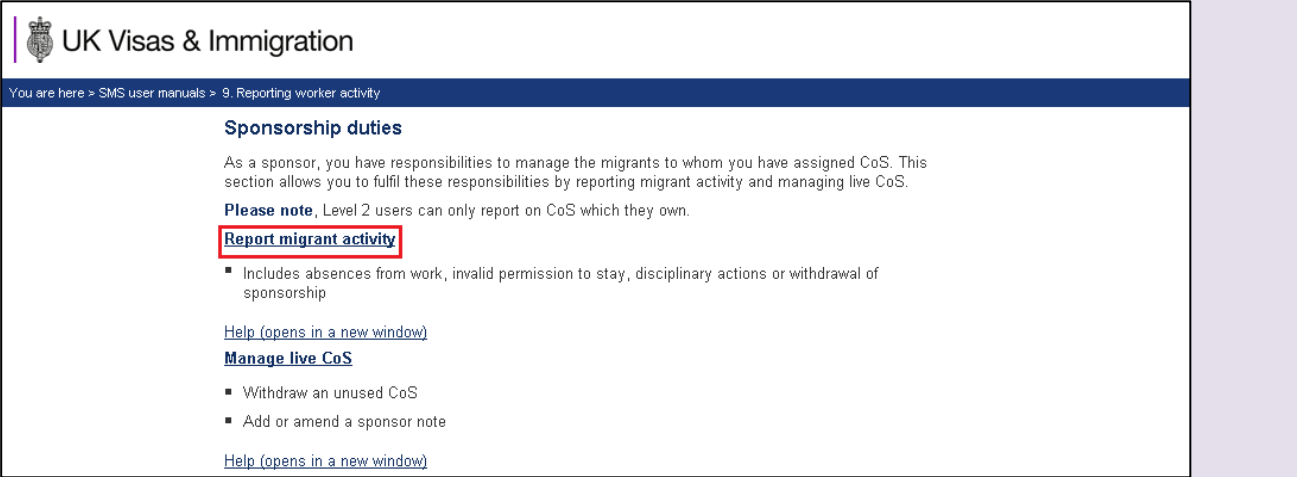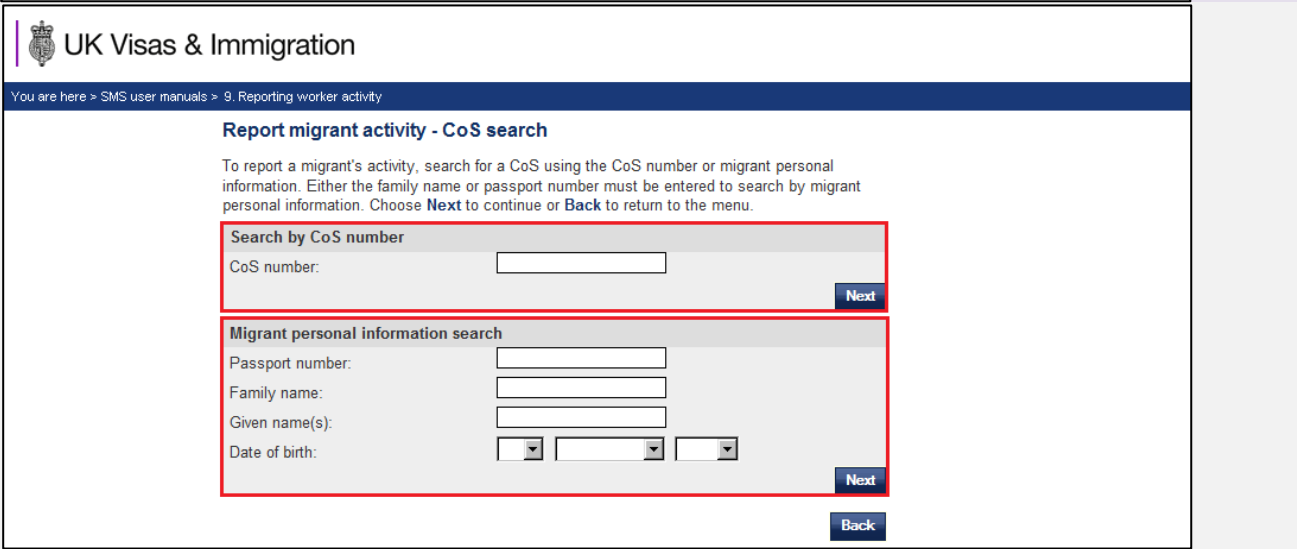
SMS guides

Guide 1: How to report individual migrant activity

Follow the step by step instructions below to search for a CoS and report migrant activity, including withdrawal of sponsorship from a migrant. This function is essential to fulfil your duties as a sponsor. Use this function to notify us of a migrant's activity, for example, the migrant has been delayed and has not entered the UK, or you are no longer sponsoring the migrant.

Please note, Level 2 users can only report migrant activity for CoS that they have personally created and assigned, or for CoS which have been transferred to them.

You should read the [Sponsorship policy guidance](#) before reporting migrant activity.

Step	Instruction	Screen example
1	From the **Workers** screen, select **Sponsorship duties**.	UK Visas & Immigration You are here > SMS user manuals > 8. Creating and assigning CoS **Workers** 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. **Create and assign** ▪ Create single CoS ▪ Create group CoS ▪ Create batches of CoS ▪ Amend information on a CoS before it is assigned ▪ Assign CoS to migrants Help (opens in a new window) **Restricted CoS** ▪ Apply for restricted CoS ▪ Apply for a restricted CoS request based on a previous request ▪ View pending restricted CoS applications ▪ Create and assign granted restricted CoS applications ▪ View refused restricted CoS applications Help (opens in a new window) **Sponsorship duties** ▪ Report migrant activity, for example, absences from work ▪ Cancel sponsorship of a migrant

Step	Instruction	Screen example
2	From the **Sponsorship duties** screen, select **Report migrant activity**.	**UK Visas & Immigration** You are here > SMS user manuals > 9. Reporting worker activity **Sponsorship duties** As a sponsor, you have responsibilities to manage the migrants to whom you have assigned CoS. This section allows you to fulfil these responsibilities by reporting migrant activity and managing live CoS. **Please note**, Level 2 users can only report on CoS which they own. **Report migrant activity** ▪ Includes absences from work, invalid permission to stay, disciplinary actions or withdrawal of sponsorship Help (opens in a new window) **Manage live CoS** ▪ Withdraw an unused CoS ▪ Add or amend a sponsor note Help (opens in a new window)
3	From the **Report migrant activity – CoS search** screen, enter your search parameters, then select **Next**.	**UK Visas & Immigration** You are here > SMS user manuals > 9. Reporting worker activity **Report migrant activity - CoS search** To report a migrant's activity, search for a CoS using the CoS number or migrant personal information. Either the family name or passport number must be entered to search by migrant personal information. Choose **Next** to continue or **Back** to return to the menu. **Search by CoS number** CoS number: [ ] **Next** **Migrant personal information search** Passport number: [ ] Family name: [ ] Given name(s): [ ] Date of birth: [▾] [▾] [▾] **Next** **Back**
Note	• If your search parameters are not specific, you will be presented with a long list of CoS. Select the CoS on which you wish to report. • You can only report against a CoS that has been used in a migrant's application for leave to enter, leave to remain or worker authorisation.	

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Step	Instruction	Screen example
4	From the **CoS search results** screen, check that you have identified the correct CoS. If not, select **Back**. If it is the correct CoS, select **Next**.	**UK Visas & Immigration** You are here > SMS user manuals > 9. Reporting worker activity **CoS search results** Check that is the migrant for whom you wish to report activity and select **Next**. If this is not the correct migrant, select **Back**. **CoS summary** CoS number: C2G2Z94812A CoS status: USED Passport number: 65465465465654654 Family name: Smith Given name(s): Sam Nationality: BERMUDA Date of birth: 28/10/1979 Gender: Male **Back** **Next**

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Step	Instruction	Screen example

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From the **Report new activity** drop-down menu, choose the appropriate reason, then select **Next**.

You can also view previously reported activity on this screen, under the **Reported activity** heading.

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View and report migrant activity

The migrant's activity report is displayed below.

To report a new activity, select the type of activity from the drop down list and choose **Next** to continue. Choose **Back** to return to the **CoS search results** screen.

Reported activity

CoS number: C2G2Z94812A

Date and time	Activity type

Report new activity

Please select

- Please select
- Sponsor continuing to sponsor migrant worker
- Sponsor has stopped sponsoring migrant worker
- Change in migrant worker circumstances
- Previous notification withdrawn

Back Next

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Step	Instruction	Screen example
6	From the **Report migrant activity – date and reason** screen, select a further reason from the **Select details** drop-down menu, complete the date and provide full details. When complete, select **Save**.	

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Report migrant activity - date and reason

Enter the activity you want to report and the reasons for the activity, including dates and choose **Save** to submit the information to us.

This will be assessed and you will be contacted if necessary.

Choose **Cancel** to return to the previous page.

Activity details

CoS number:	C2G2Z94812A
Activity type	Sponsor continuing to sponsor migrant worker
Select details: *	Please select
Relevant date: *	
Give full details: *	

Cancel   Save

Note	From 6 April 2014, if you are reporting withdrawal of sponsorship, you will be required to enter the last recorded residential address for the student. In addition, if you have the phone number and email address you should include them in the report.	

Step	Instruction	Screen example
7	You are returned to the **View and report migrant activity** screen. You can see your report activity is listed at the top of the **Reported activity** section.	
Note	Only the initial *Activity type* selection of the submitted report is available to view	

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Guide 2: How to add and amend sponsor notes

Follow the step by step instructions below to add a sponsor note to a CoS with a status of ASSIGNED. This function is useful if you wish to notify us of changes to details of a live CoS. It is not possible to edit a live CoS, but if any of the previously submitted information is incorrect, you may add a sponsor note to provide the correct details.

Please note, Level 2 users can only add a sponsor note on CoS that they have personally created and assigned, or to CoS that have been transferred to them.

You should read the [Sponsorship policy guidance](#) before adding a sponsor note to a live CoS.

Step	Instruction	Screen example
1	From the **Workers** screen, select **Sponsorship duties**.	

The screen example shows:

UK Visas & Immigration

You are here > SMS user manuals > 8. Creating and assigning CoS

Workers

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.

Create and assign

- Create single CoS
- Create group CoS
- Create batches of CoS
- Amend information on a CoS before it is assigned
- Assign CoS to migrants

Help (opens in a new window)

Restricted CoS

- Apply for restricted CoS
- Apply for a restricted CoS request based on a previous request
- View pending restricted CoS applications
- Create and assign granted restricted CoS applications
- View refused restricted CoS applications

Help (opens in a new window)

Sponsorship duties

- Report migrant activity, for example, absences from work
- Cancel sponsorship of a migrant
- Manage active CoS, for example, cancelling a CoS before the migrant has applied for a visa

Help (opens in a new window)

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Step	Instruction	Screen example
2	From the **Sponsorship duties** screen select **Report migrant activity**.	
3	From the **Search for a CoS** screen, enter your search parameters, then select **Next**.	
Note	If your search parameters are not specific, you will be presented with a list of CoS. This screen is not featured in this guide. Select the CoS to which you wish to add a note. If your search parameters are specific, you will be presented with the screen below.	

| 4 | From the **Manage live CoS** screen, check that you have identified the correct CoS. If not, select **Back**.

If it is the correct CoS, select **Sponsor note**. | |

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Step	Instruction	Screen example
5	From the **Edit sponsor note** screen, enter the details you wish to add in the **Sponsor note** field, then select **Save**.	**UK Visas & Immigration** You are here > SMS user manuals > 9. Reporting worker activity **Edit sponsor note** To edit the sponsor note, add the information required. If you are amending the note, you can either overtype the existing text or add additional text. Any text that is overtyped will not be saved, so do not overtype any existing text if it is still relevant. Choose **Save** to confirm your changes or choose **Cancel** to return to the previous screen. **Tier and category** Tier 2 (General - Extensions) **CoS summary** CoS number: C2G3A34812A CoS status: ASSIGNED Expiry date (use by): 06 June 2014 Passport number: 987654321 Family name: Smith Given name(s): Josh Nationality: CHILE Date of birth: 26/07/1971 Gender: Male Sponsor note: Cancel Save

Note	
1.	This function can only be used to notify us of any changes <u>before</u> the migrant uses the CoS in support of their application. The system will therefore only allow you to add a sponsor note to a live CoS with a status of ASSIGNED (Unused).
2.	If you wish to add more information at a later date (and before the CoS has been used), you must add it after the previously entered text.
3.	If you wish to replace your earlier sponsor note with alternative details, you can do so by over-typing the original text. Take care not to over-type any text accidentally, as the original content will be lost.

Step	Instruction	Screen example
6	From the **Manage live CoS** screen, the note you created is displayed.	**UK Visas & Immigration** You are here > SMS user manuals > 9. Reporting worker activity **Manage live CoS** Manage the live CoS using the buttons below, choose: ▪ **Sponsor note** to add a note to a CoS, for example to inform us of a spelling mistake in a name or a change to a passport number. ▪ **Withdraw CoS** to withdraw the CoS before it has been used by the migrant in an application for leave to enter/remain. This option is only available for CoS with a status of **Assigned**. ▪ **Back** to return to the previous screen. **Tier and category** Tier 2 (General - Extensions) **CoS summary** CoS number: C2G3A34812A CoS status: ASSIGNED Expiry date (use by): 06 June 2014 Passport number: 987654321 Family name: Smith Given name(s): Josh Nationality: CHILE Date of birth: 26/07/1971 Gender: Male Sponsor note: Migrant's date of birth should read 26/08/1991 - not July. Back Withdraw CoS Sponsor note