The sponsorship management system (SMS) manuals

Step by step guide for sponsors

Manual 6 of 12: Miscellaneous CAS functions

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 Basic Compliance Assessment and manage Action plans	Common	To help sponsors apply for 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.	Sponsors licensed in Skilled Worker

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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.

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CAS status

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

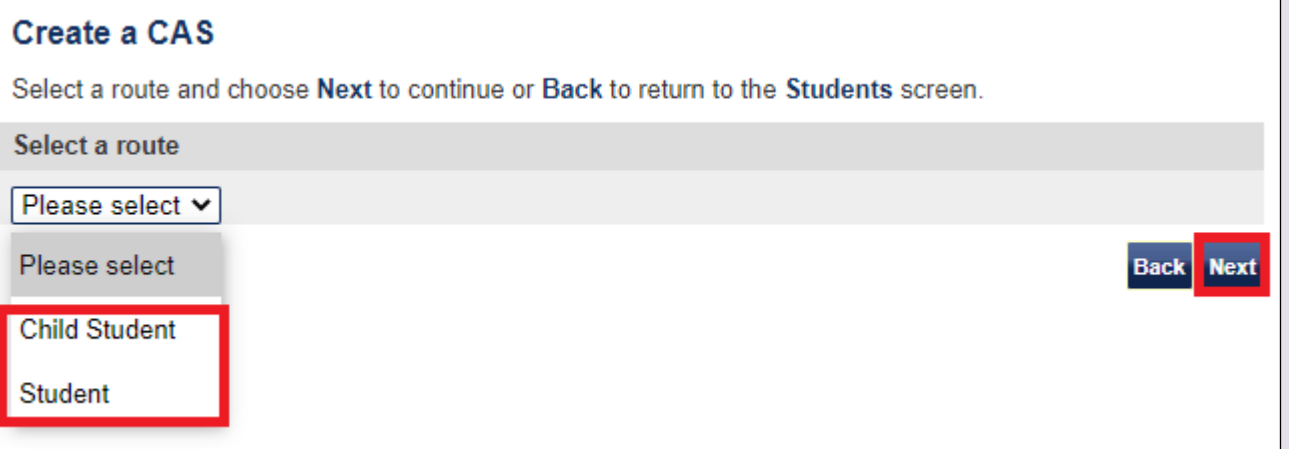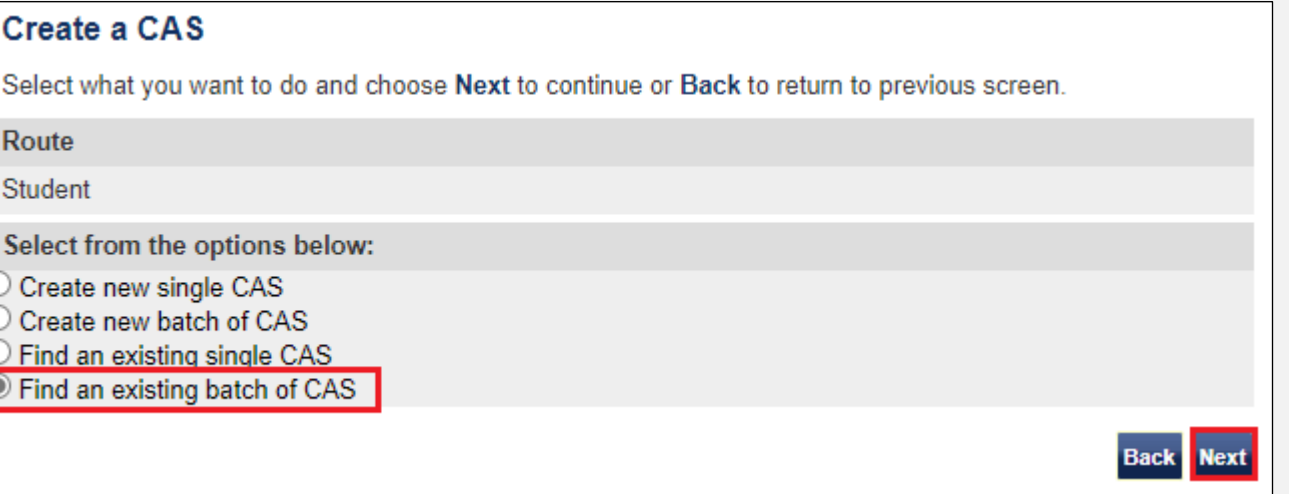| As seen in SMS	Meaning
WORK IN PROGRESS	The CAS is still 'in draft' as one or more mandatory fields are yet to be completed.
READY TO GO	All mandatory fields are complete and the CAS is ready to be assigned to an individual.
ASSIGNED	The CAS has been assigned to an individual and is ready to be used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

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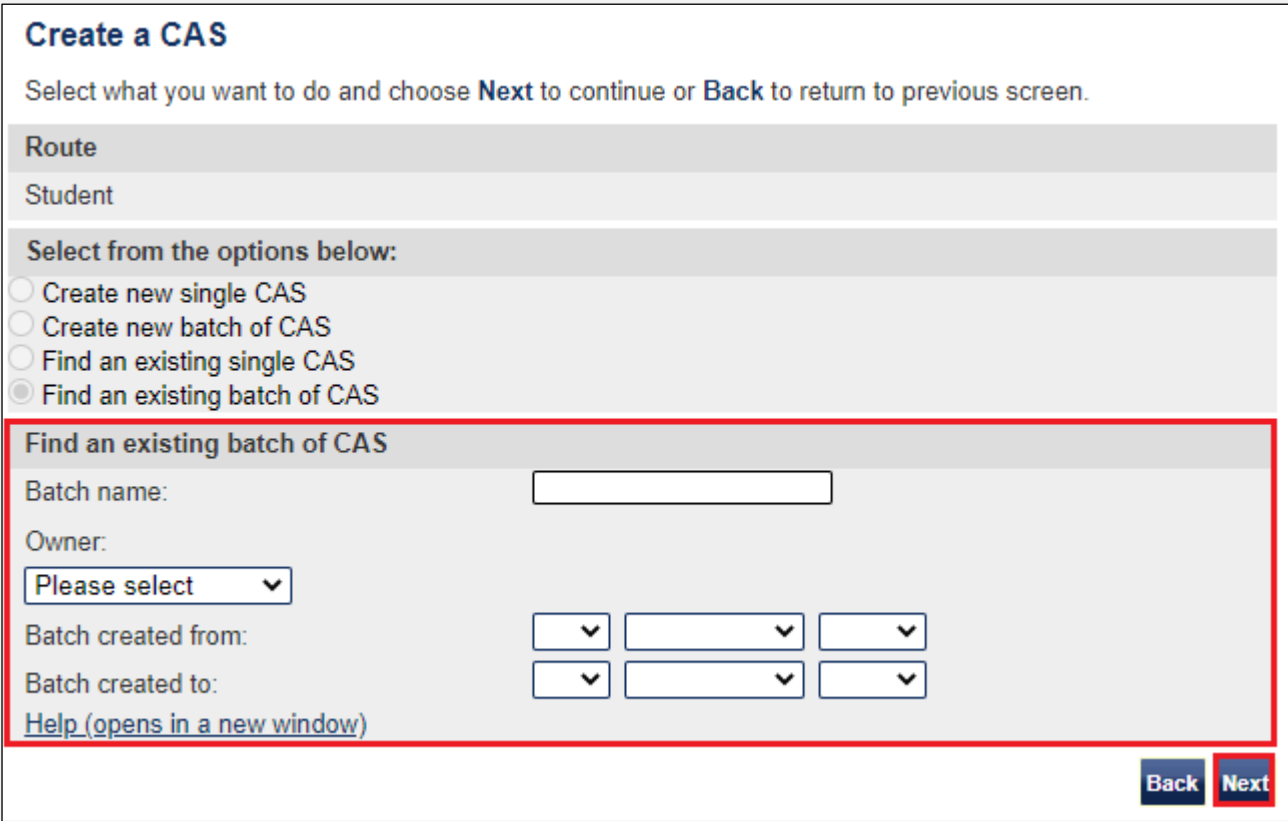
SMS guides

Guide 1: How to add a CAS to a batch

Follow the step by step instructions below to add a CAS to a batch, with or without pre-populated course details. This function is useful if you wish to assign CAS for several students to undertake the same course of study.

You should read the [Sponsorship policy guidance](#), [SMS guide 4a – Creating a CAS – guide for education sponsors](#) and details of the [BDT toolkit](#) before adding a CAS to a batch.

Step	Instruction	Screen example
1	From the **Students** screen, select **Create CAS**.	

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Step	Instruction	Screen example
2	From the **Create a CAS** screen, select the relevant route (Student or Child Student) and choose **Next**. If you are only licensed under one of these routes, the drop-down list will default to that category.	**Create a CAS** Select a route and choose **Next** to continue or **Back** to return to the **Students** screen. **Select a route** Please select ⌄ Please select Child Student Student Back Next
3	From the second **Create a CAS** screen, choose **Find an existing batch of CAS** and 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 Back Next

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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 batch of CAS** Batch name: Owner: Please select 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. The screen is not featured in this guide. Select the batch to which you wish to add CAS. If your search parameters are specific, you will be presented with the screen below.

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Step	Instruction	Screen example

Step: 5

Instruction:

From the **Batch details** screen, select **Add pre-populated CAS** to add a CAS with the course details pre-populated, or select **Add CAS** to add a CAS with no pre-populated data.

Add pre-populated CAS will be unavailable (greyed out) if the batch does not contain any other CAS from which to replicate the details.

Screen example:

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:	* Test Batch
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

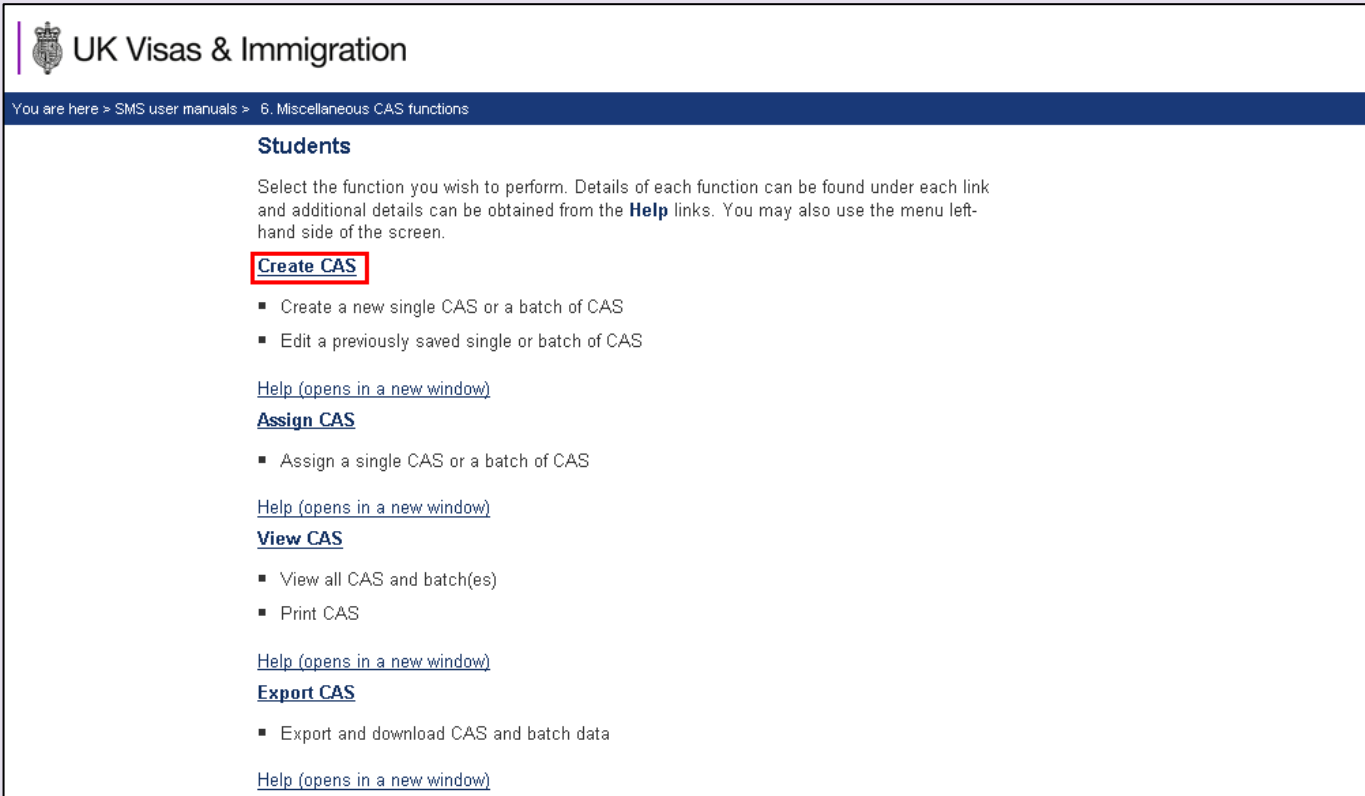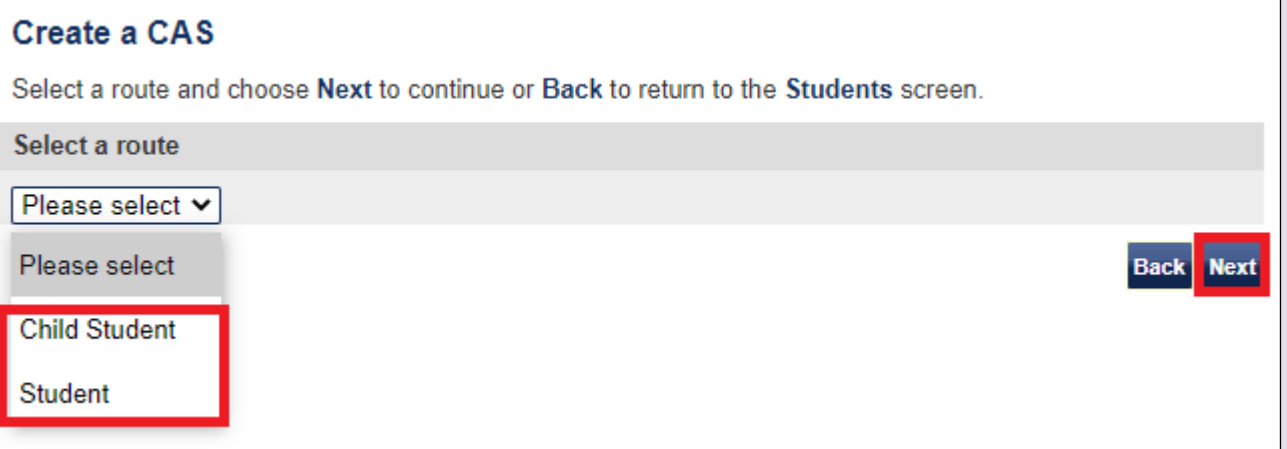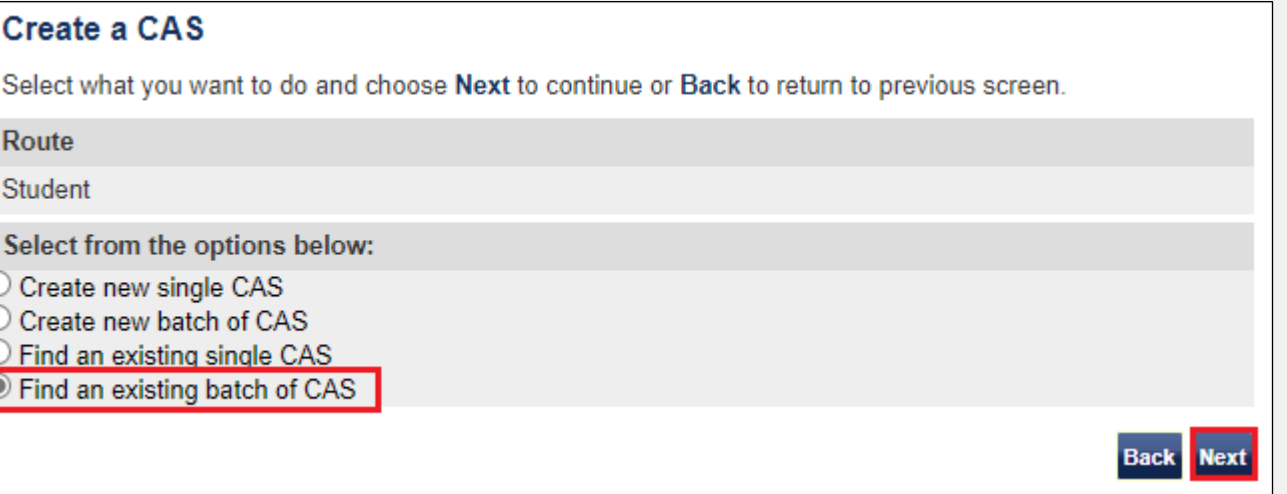| Step	Instruction	Screen example
6	From the **Create a CAS** screen, if you selected **Add pre-populated CAS**, the course details, such as the course, fee and accommodation details will be automatically populated and you only need to complete the student details. Enter any outstanding details, then select **Save**. Once complete, you will be returned to the **Batch details screen** and your newly added CAS will be displayed as part of the batch.	**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: * Smith Given name(s): Other names: Date of birth: * Gender: * Please select Nationality: * Please select Place of birth: Help (opens in a new window) Country of birth: * Please select Passport number: * Applicant number: Help (opens in a new window) UCAS ID number: Help (opens in a new window) **Offer details** Enter the course and study details of the offer that the CAS supports. **Course details**

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Guide 2: How to delete a batch of CAS

Follow the step by step instructions below to delete a batch and all CAS within the batch. This function is useful if you have created a batch of CAS for students on a particular course that has now been cancelled.

You should read the Sponsorship policy guidance and SMS guide 4a – Creating a CAS – guide for education sponsors before deleting CAS and batches of CAS.

Step	Instruction	Screen example
1	From the **Student** screen, select **Create CAS**.	

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Step	Instruction	Screen example
2	From the **Create a CAS** screen, select the relevant route (Student or Child Student) and choose **Next**. If you are only licensed under one of these routes, the drop-down list will default to that category and this step won't be necessary.	**Create a CAS** Select a route and choose **Next** to continue or **Back** to return to the **Students** screen. **Select a route** Please select ▾ Please select Child Student Student Back Next
3	From the second **Create a CAS** screen, choose **Find an existing batch of CAS** and 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 Back Next

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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 batch of CAS** Batch name: Owner: Please select 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 delete. If your search parameters are specific, you will be presented with the screen below. |

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Step	Instruction	Screen example
5	From the **Batch details** screen, select **Delete all**.	**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:	* Test Batch
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
6	From the **Confirm deletion of batch** screen, select **Delete**. Only proceed if you are sure, as this action will delete all CAS within the batch and cannot be reversed. If you are unsure, select **Cancel**.	**Confirm deletion of batch** Choose **Delete** to confirm you would like to delete the batch and all the CAS within. **Please note**, this action cannot be undone and you will lose all the CAS within the batch. If you do not want to continue choose **Cancel**. **Route** Student **Batch details** Batch name: Test Bat Number of CAS in batch: 0 Cancel Delete
7	From the **Batch successfully deleted** screen, select **OK** to return to the **Create a CAS** screen.	**Batch successfully deleted** The batch has been successfully deleted, choose **OK** to continue. OK

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Guide 3: How to unlink a CAS from a batch

Follow the step by step instructions to unlink a CAS from a batch. This function is useful if you have linked a CAS to a batch in error.

Please note, you can only unlink a CAS from a batch if the batch has not yet been assigned.

You should read the Sponsorship policy guidance and SMS guide 4a – Creating a CAS – guide for education sponsors before unlinking a CAS from a batch.

Step	Instruction	Screen example
1	From the **Students** screen, select **View CAS**.	UK Visas & Immigration You are here > SMS user manuals > 6. Miscellaneous CAS functions **Students** 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 CAS** ▪ Create a new single CAS or a batch of CAS ▪ Edit a previously saved single or batch of CAS Help (opens in a new window) **Assign CAS** ▪ Assign a single CAS or a batch of CAS Help (opens in a new window) **View CAS** ▪ View all CAS and batch(es) ▪ Print CAS Help (opens in a new window) **Export CAS** ▪ Export and download CAS and batch data Help (opens in a new window)

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Step	Instruction	Screen example
2	From the **View CAS** screen, select **Find by CAS number** if the student's CAS number of the student is known or **Search for CAS** if you don't know the CAS number.	

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Step	Instruction	Screen example

3

From the **Find by CAS number / Search for CAS** screen, enter the student's CAS number or the student's details, then select **Next**.

The screen example shows both search functions.

UK Visas & Immigration

You are here > SMS user manuals > 6. Miscellaneous CAS functions

Find by CAS number

Enter the CAS number of the CAS you want to find. If you do not know the CAS number, use the **Search for CAS** option instead. Choose **Next** to continue or **Back** to return to the **View CAS** screen.

CAS number

CAS number:

Help (opens in a new window)

[Back] [Next]

Search for CAS

Enter search criteria to find the CAS. You must enter either the passport number or family name; you can also refine your search by entering the given name and/or date of birth.

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. The screen is not featured in this guide. Select the CAS you wish to unlink. If your search parameters are specific, you will be presented with the screen below.

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Step	Instruction	Screen example
4	From the **CAS details** screen, select **Unlink CAS from Batch of CAS** from the **CAS activity** drop-down menu, then select **Next**.	

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Step	Instruction	Screen example
5	From the **Unlink CAS from batch** screen, select **Unlink**.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Unlink CAS from batch** To confirm that you would like to unlink the CAS record below from the batch detailed choose **Unlink**. If you do not want to continue choose **Cancel**. **Tier and category** Tier 4 (General) **Batch details** Batch name: SMS R500 **Student details** Passport number: 97978987 Family name: Smith Given name(s): Gemma Nationality: BENIN Date of birth: 05/05/1976 Course start date: 26/04/2014 Course title: Maths Cancel **Unlink**
6	The CAS has now been unlinked. Select **OK** to return to **CAS details** screen.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **CAS record unlinked successfully** The CAS record was successfully unlinked from the batch, choose **OK** to continue. **OK**
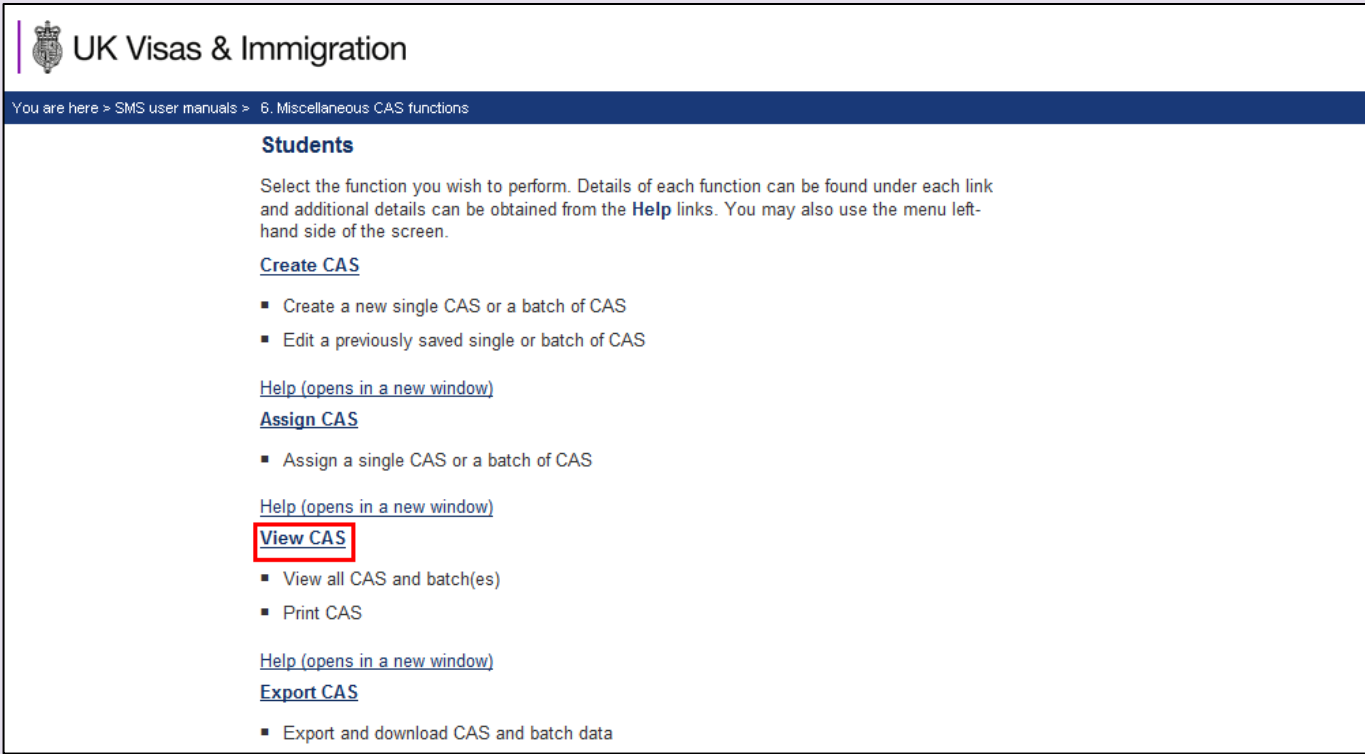
Guide 4: How to transfer ownership or print a CAS

Follow the step by step instructions below to transfer ownership of a CAS or to print a CAS. These functions are useful if you wish to print a hard-copy of a CAS for a student to use in a support of an application for leave to enter or remain, or a SMS user wishes to transfer ownership of a CAS to another SMS user. This may be necessary if a SMS user is no longer in a role that requires them to use SMS or if another SMS user is taking ownership of SMS user's workload.

You should read the Sponsorship policy guidance and SMS guide 4a – Creating a CAS – guide for education sponsors before transferring ownership of a CAS.

Step	Instruction	Screen example
1	From the **Students** screen, select **View CAS**.	

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Step	Instruction	Screen example
2	From the **View CAS** screen, select **Find by CAS number** if the student's CAS number is known or **Search for CAS** if you don't know the CAS number.	

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Step	Instruction	Screen example

3	From the **Search for CAS / Find by CAS number** screen, enter the student's CAS number or the student's details you wish to search for, then select **Next**. The screen example shows both search functions.	

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

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Step	Instruction	Screen example
4	*To transfer a CAS:* Select the drop-down **CAS activity**; choose **Transfer CAS Ownership**, then select **Next**. *To print a CAS:* Select **Print** and see *Step 7*	

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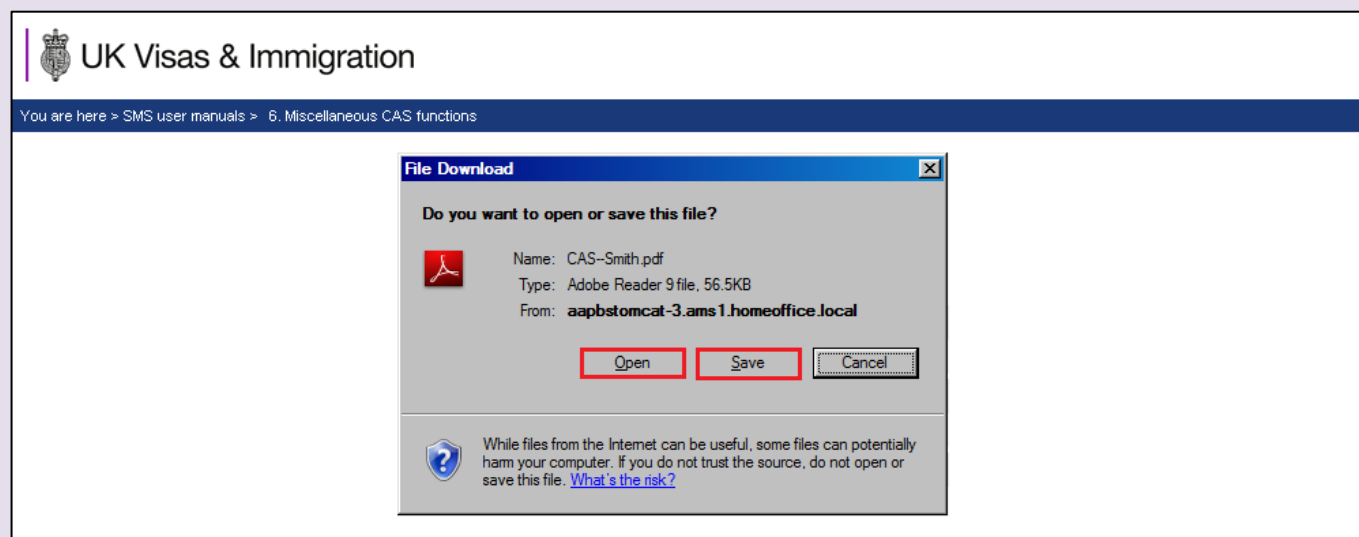| Step	Instruction	Screen example
5	*Transfer a CAS:* From the **Transfer a single CAS** screen, chose the SMS user to whom you wish to transfer the CAS by selecting their name from the **Select to whom you wish to transfer the CAS** drop-down menu, then select **Transfer**.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Transfer a single CAS** To transfer this single CAS to another user, select the user to whom you would like to transfer the CAS, then choose **Transfer**. Choose **Cancel** to return to the previous screen. **Tier and category** Tier 4 (General) **CAS details** CAS status: READY TO GO **Student details** Passport number: 97978987 Family name: Smith Given name(s): Gemma Nationality: BENIN Date of birth: 05/05/1976 Course start date: 26/04/2014 Course title: Maths **User transferring CAS to:** Select to whom you wish to transfer the CAS: Please select Please select White, Clint (zajdp05sn) Cancel Transfer
6	The CAS has now been transferred. Select **OK** to return to **CAS details** screen.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Transfer of single CAS complete** The CAS transfer has been completed successfully. Choose **OK** to continue. OK

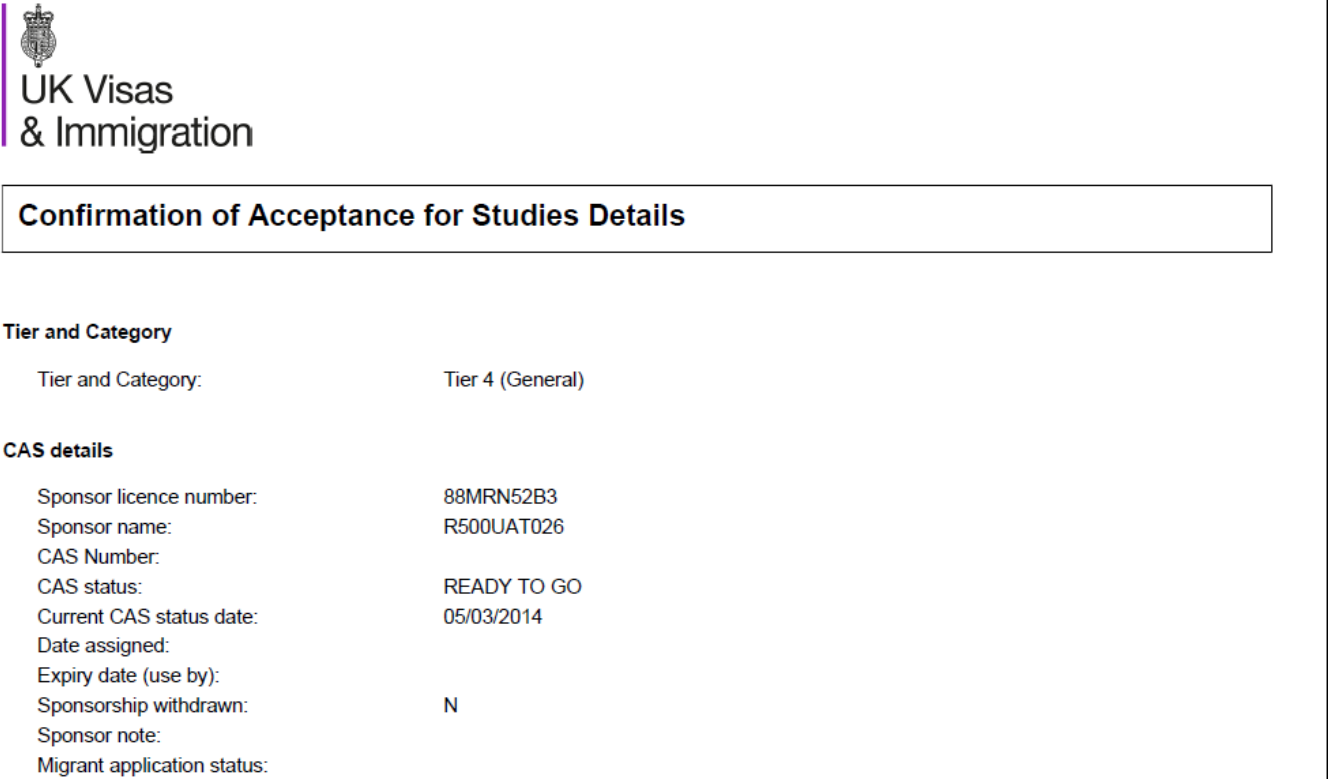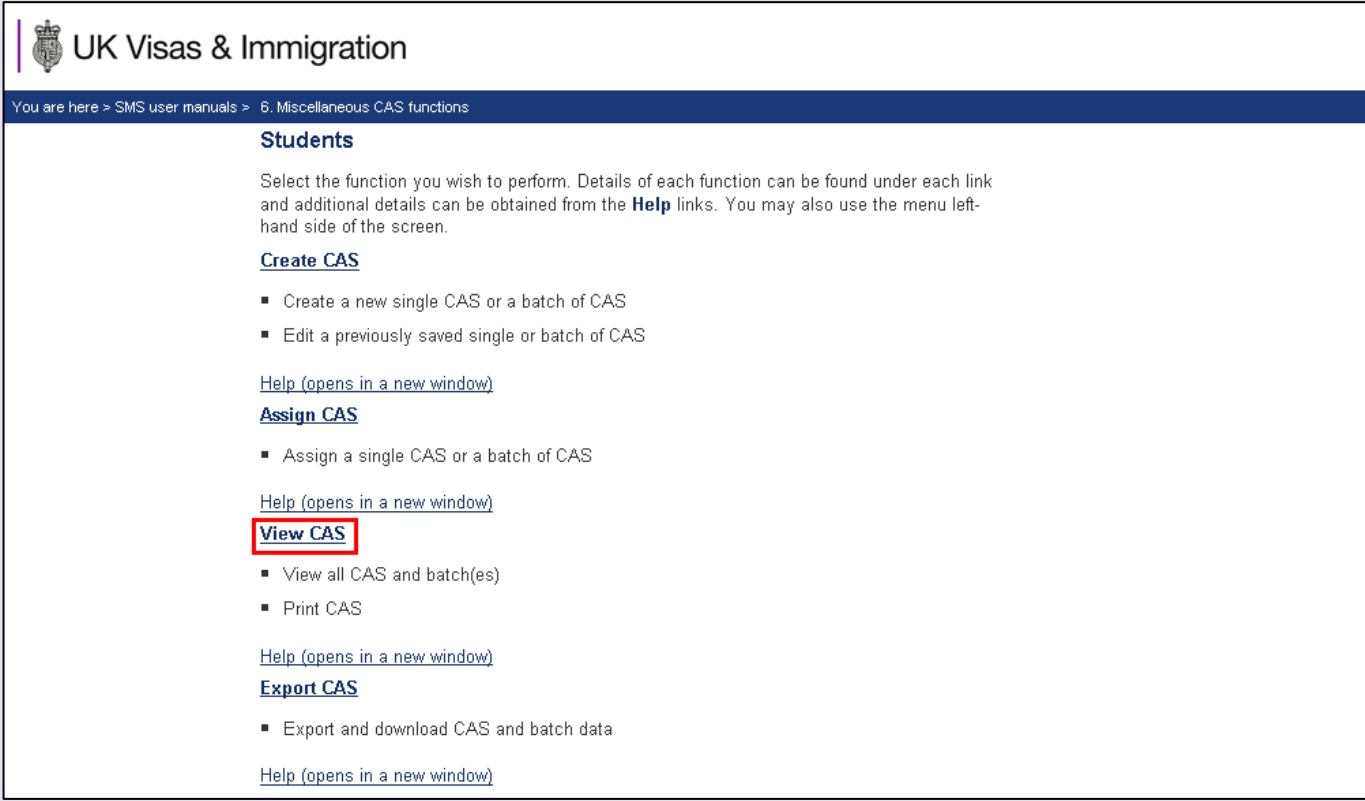| Step	Instruction	Screen example
7	*Print a CAS:* A **File Download** dialogue box will appear, from which you can choose **Open** to produce a printable PDF version or **Save** to save the PDF file to your own records and print later.	

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Step	Instruction	Screen example
8	When the PDF file is opened, use the Print command from your browser/PDF viewer to produce a hard copy.	**UK Visas & Immigration** **Confirmation of Acceptance for Studies Details** **Tier and Category** Tier and Category: Tier 4 (General) **CAS details** Sponsor licence number: 88MRN52B3 Sponsor name: R500UAT026 CAS Number: CAS status: READY TO GO Current CAS status date: 05/03/2014 Date assigned: Expiry date (use by): Sponsorship withdrawn: N Sponsor note: Migrant application status:
Note	1. The keyboard shortcut for printing is CTRL+P on a computer running Windows or CMD+P on a computer running OSX. 2. You will only be able to open and print the PDF version of the CAS if you have the appropriate software installed or an appropriate browser extension.	

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Guide 5: How to link a CAS to a batch

Follow the step by step instructions below to link a CAS to a pre-existing batch. This function is useful if you have previously created a CAS but now wish to link it to a batch.

You should read the Sponsorship policy guidance and SMS guide 4a – Creating a CAS – guide for education sponsors before linking a CAS to a batch.

Step	Instruction	Screen example
1	From the **Students** screen, select **View CAS**.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Students** 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 CAS** ▪ Create a new single CAS or a batch of CAS ▪ Edit a previously saved single or batch of CAS Help (opens in a new window) **Assign CAS** ▪ Assign a single CAS or a batch of CAS Help (opens in a new window) **View CAS** ▪ View all CAS and batch(es) ▪ Print CAS Help (opens in a new window) **Export CAS** ▪ Export and download CAS and batch data Help (opens in a new window)

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Step	Instruction	Screen example
2	From the **View CAS** screen, select **Find by CAS number** if the student's CAS number is known, or **Search for single CAS** if you don't know the CAS number.	

Step	Instruction	Screen example

3	From the **Find by CAS number / Search for CAS** screen, enter the student's CAS number or the student's details you wish to search for and when complete, select **Next**. The screen example shows both search functions.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Find by CAS number** Enter the CAS number of the CAS you want to find. If you do not know the CAS number, use the **Search for CAS** option instead. Choose **Next** to continue or **Back** to return to the **View CAS** screen. **CAS number** CAS number: [_____] Help (opens in a new window) Back Next **Search for CAS** Enter search criteria to find the CAS. You must enter either the passport number or family name; you can also refine your search by entering the given name and/or date of birth. 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 link. If your search parameters are specific, you will be presented with the screen below.

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Step	Instruction	Screen example

4

From the **CAS details** screen select **Link CAS into Batch of CAS** from the **CAS activity** drop-down menu, then select **Next**.

UK Visas & Immigration

CAS details

The full details of the CAS are displayed below. Select from the options below, choose:

- **CAS activity** to transfer the CAS to another user (where permissions allow) or link/unlink the CAS to/from a batch, then select **Next** to continue;
- **Print** to save or print a .pdf of the CAS; or
- **Back** to return to the previous screen.

Please note, if you want to amend and/or assign a CAS, you can do so by selecting the **Create CAS** function, then **Find an existing single CAS**.

Tier and category	
Tier 4 (General)	

CAS details	
Sponsor licence number:	88MRN52B3
Sponsor name:	R500UAT026
CAS number:	
CAS status:	READY TO GO
Current CAS status date:	05/03/2014
Date assigned:	
Expiry date (use by):	
Sponsorship withdrawn:	N
Sponsor note:	
Migrant application status:	

Student details

Student details	
Family name:	Smith
Given name(s):	Gemma

CAS activity selection	
CAS activity:	Please select

Please select
Transfer CAS Ownership
Link CAS into Batch of CAS

Back   Print   Next

_____

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Step	Instruction	Screen example

| **5** | From the **Link CAS into batch** screen, search for the batch to which you wish to link the CAS and choose **Next**. | |

Link CAS into batch

Search for the batch you would like to link the selected CAS record to and choose **Next** to continue. If you do not want to continue select **Cancel**.

Tier and category

Tier 4 (General)

Student details

Passport number:	97978987
Family name:	Smith
Given name(s):	Gemma
Nationality:	BENIN
Date of birth:	05/05/1976
Course start date:	26/04/2014
Course title:	Maths

Batch search details

Batch name:	
Owner:	Please select
Batch created from:	
Batch created to:	

Help (opens in a new window)

Next

Cancel

Note	You must be the owner of the batch to be able to transfer it to another SMS user.

Step	Instruction	Screen example
6	From the **Confirm link CAS into batch** screen, ensure you have selected the correct batch, then select **Link**.	

Note   If you have more than one batch, you will be asked to select the batch to which the CAS is to be linked.

_____

Step	Instruction	Screen example
7	Your CAS has been successfully linked and you will be taken to the **CAS record linked successfully** screen. Select **OK** to return to **Batch details** screen.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **CAS record linked successfully** The CAS record was successfully linked into the batch, choose **OK** to continue. OK

_____

Guide 6: How to transfer ownership of a CAS in a batch

Follow the step by step instructions to search for a batch of CAS by batch owner and transfer ownership of the batch. This function is useful if a SMS user wishes to transfer ownership of a batch to another SMS user. This may be necessary if a user is no longer in a role that requires them to use SMS, or if a user is taking ownership of another SMS user's workload.

You should read the Sponsorship policy guidance and SMS guide 4a – Creating a CAS – guide for education sponsors before transferring ownership of a CAS in a batch.

Step	Instruction	Screen example
1	From the **Students** screen, select **View CAS**.	

_____

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Step	Instruction	Screen example
2	From the **View CAS** screen**,** select **Search for batch(es) of CAS**.	UK Visas & Immigration You are here > SMS user manuals > 6. Miscellaneous CAS functions **View CAS** Choose one of the options below to find the CAS or batch(es) you want to view. **Find by CAS number** - Find a CAS where CAS number is known Help (opens in a new window) **Search for CAS** - Find a CAS using student details - Conduct an advanced search for CAS using a range of parameters Help (opens in a new window) **Search for batch(es) of CAS** - Find a batch of CAS using batch details Help (opens in a new window)

_____

Step	Instruction	Screen example
3	From the **Search for batch(es) of CAS** screen, enter your search parameters, then select **Next**.	UK Visas & Immigration You are here > SMS user manuals > 6. Miscellaneous CAS functions **Search for batches of CAS** Search for an existing batch of CAS by completing at least one line of search criteria, and choose **Next** to continue. Choose **Back** to return to the **View CAS** screen. **Batch search criteria** Batch name: Owner: Please select Category: Please select Batch created from: Batch created to: Work in progress: ☐ Ready to go: ☐ Assigned: ☐ 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 transfer. If your search parameters are specific, you will be presented with the screen below. |

_____

| 4 | From the **Transfer batch of CAS** screen, select the person to whom you wish to transfer the batch using the **Select to whom you wish to transfer the CAS** drop-down menu, then select **Transfer**. | |

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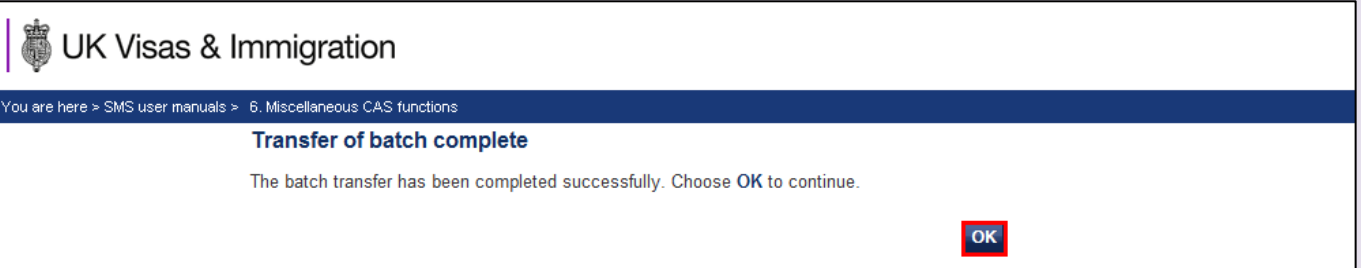You are here > SMS user manuals > 6. Miscellaneous CAS functions

Transfer batch of CAS

To transfer this batch of CAS to another user, select the user to whom you would like to transfer the batch of CAS, then choose Transfer. Choose Cancel to return to the previous screen.

Tier and category	
Tier 4 (General)	

Batch details	
Batch name:	SMS R500
Number of CAS in batch:	2
Owner:	Don, DJ (OsNBX7uVOL)
Status:	READY TO GO

User transferring CAS to:	
Select to whom you wish to transfer the CAS:	Please select
	Please select
	White, Clint (zajdp05sn)

Cancel   Transfer

Note This may take some time to complete.

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Step	Instruction	Screen example
5	The **Transfer of batch complete** screen is now displayed. Select **OK** to return to **CAS search results** screen.	UK Visas & Immigration You are here > SMS user manuals > 6. Miscellaneous CAS functions **Transfer of batch complete** The batch transfer has been completed successfully. Choose **OK** to continue. OK

Guide 7: How to export CAS records

Follow the step by step instructions below to export CAS records to an .XML file. This function is useful if you have a large number of records which you would like to import into your local system.

Please note, the export function will not return CAS which have a status of READY TO GO or WORK IN PROGRESS.

Step	Instruction	Screen example
1	From the **Student** screen, select **Export CAS**.	

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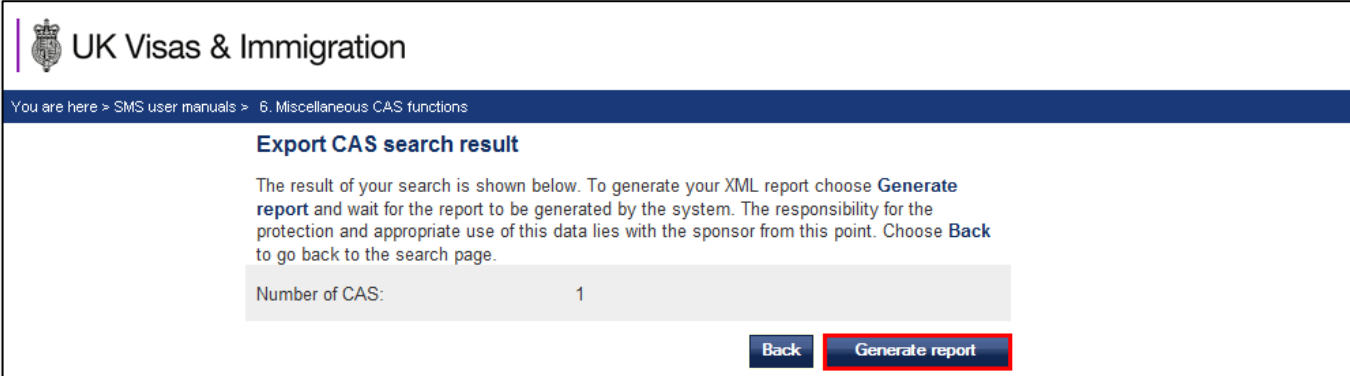| Step	Instruction	Screen example
2	From the **Export CAS search** screen, select the information you would like your report to contain, then, then select **Next**.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Export CAS search** Enter your search criteria below and choose **Next** to continue. The system will search for CAS and return a summary of the data to be exported in an XML compressed zip file. The criteria course or curriculum title and unique batch name support a wildcard search. A wildcard search requires a minimum of three characters plus an '*', for example HIS* entered as a course title would return all CAS for courses starting with the letters 'HIS'. Choose **Back** to return to the students home page. **Search details** **By CAS details** Assigned ☐ Expired ☐ Used ☐ Obsolete ☐ Withdrawn ☐ Cancelled ☐ Date CAS status last changed (from): ▾ ▾ ▾ Date CAS status last changed (to): ▾ ▾ ▾ **By course details** Course or curriculum title: _____ Course or curriculum ID: _____ Course start date (from): ▾ ▾ ▾ Course start date (to): ▾ ▾ ▾ Expected course end date (from): ▾ ▾ ▾ Expected course end date (to): ▾ ▾ ▾ **By bulk file details** Original bulk upload file ID: _____ Date of bulk upload (from): ▾ ▾ ▾ Date of bulk upload (to): ▾ ▾ ▾ Unique batch name: _____ Back Next

Note   You can filter the records returned in order to obtain only the CAS you require.

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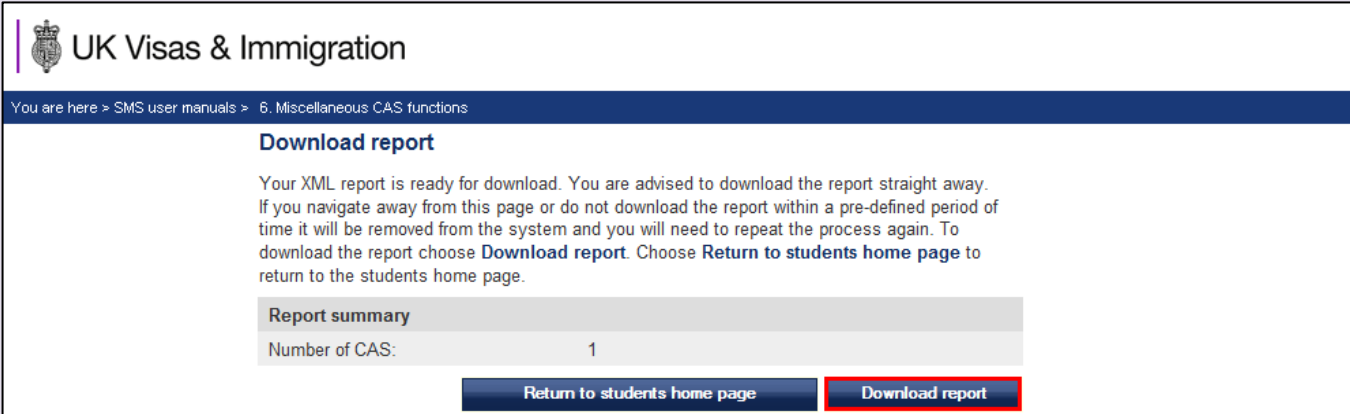| Step	Instruction	Screen example
3	From the **Export CAS search result** screen select **Generate report**.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Export CAS search result** The result of your search is shown below. To generate your XML report choose **Generate report** and wait for the report to be generated by the system. The responsibility for the protection and appropriate use of this data lies with the sponsor from this point. Choose **Back** to go back to the search page. Number of CAS: 1 [Back] [Generate report]
Note	This may take some time to generate.	

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Step	Instruction	Screen example
4	Your report has now been generated and is ready for download. Select **Download report**.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Download report** Your XML report is ready for download. You are advised to download the report straight away. If you navigate away from this page or do not download the report within a pre-defined period of time it will be removed from the system and you will need to repeat the process again. To download the report choose **Download report**. Choose **Return to students home page** to return to the students home page. **Report summary** Number of CAS: 1 [Return to students home page] [Download report]

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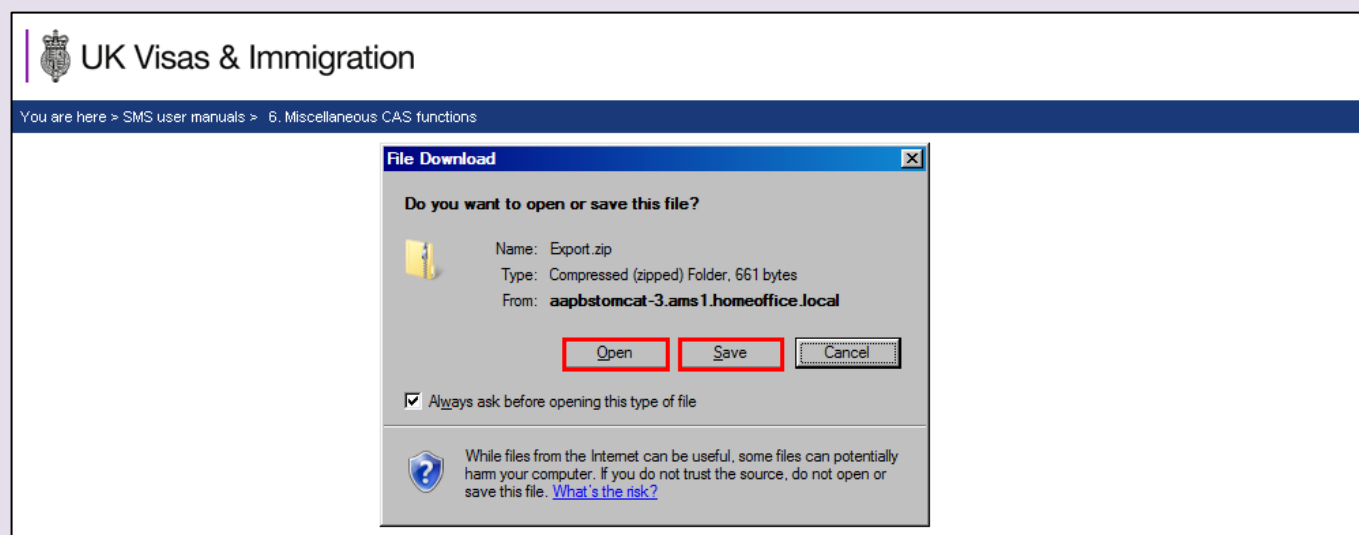
| **5** | From the **File Download** box, you are given the option to open or save the file.

It is recommended that you save the file to your local machine or network.

Select **Save**. You may change the file location or filename if you wish.

If you wish to view the file, select **Open**. | |

Step	Instruction	Screen example
6	The file will be available to select from your file explorer window. Click on the file to open it, the file should automatically open in your internet browser.	

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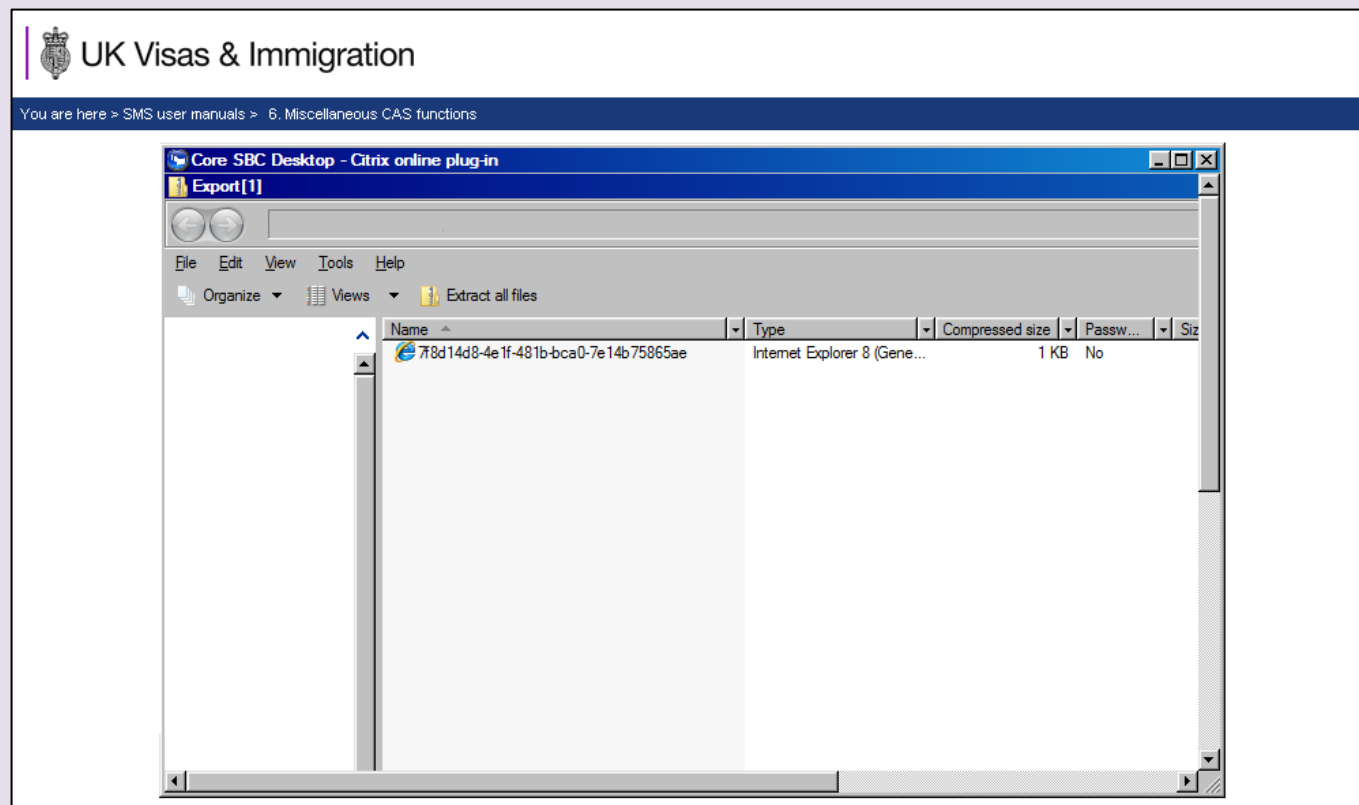
Step	Instruction	Screen example
7	The file is now open and the details of each CAS can be seen.	

The screen example shows:

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```xml
<?xml version="1.0" encoding="ISO-8859-1" standalone="yes" ?>
<BulkExportRootElement xmlns:ns2="http://homeoffice.gov.uk/immigration/migrant/cas/bulk-cas-common-200910"
    xmlns="http://homeoffice.gov.uk/immigration/migrant/cas/bulk-cas-export-200910">
  <ExportFileHeader>
    <BulkExportId>7f8d14d8-4e1f-481b-bca0-7e14b75865ae</BulkExportId>
    <ReportConstructionDate>2014-03-05</ReportConstructionDate>
  </ExportFileHeader>
  <CASExportData>
    <CASNumber>E4G6IA7A15R0A7</CASNumber>
    <CASStatus>ASSIGNED</CASStatus>
    <LastStatusChanged>2014-02-28</LastStatusChanged>
    <FamilyName>lkl</FamilyName>
    <GivenName>lk</GivenName>
    <Nationality>BWA</Nationality>
    <DateOfBirth>
      <ns2:FullDate>1937-03-22</ns2:FullDate>
    </DateOfBirth>
    <PassportTravelDocumentNumber>65465464665454</PassportTravelDocumentNumber>
    <CourseCurriculumTitle>654</CourseCurriculumTitle>
    <CourseStartDate>2014-01-30</CourseStartDate>
    <ExpectedCourseEndDate>2015-02-21</ExpectedCourseEndDate>
  </CASExportData>
</BulkExportRootElement>
```
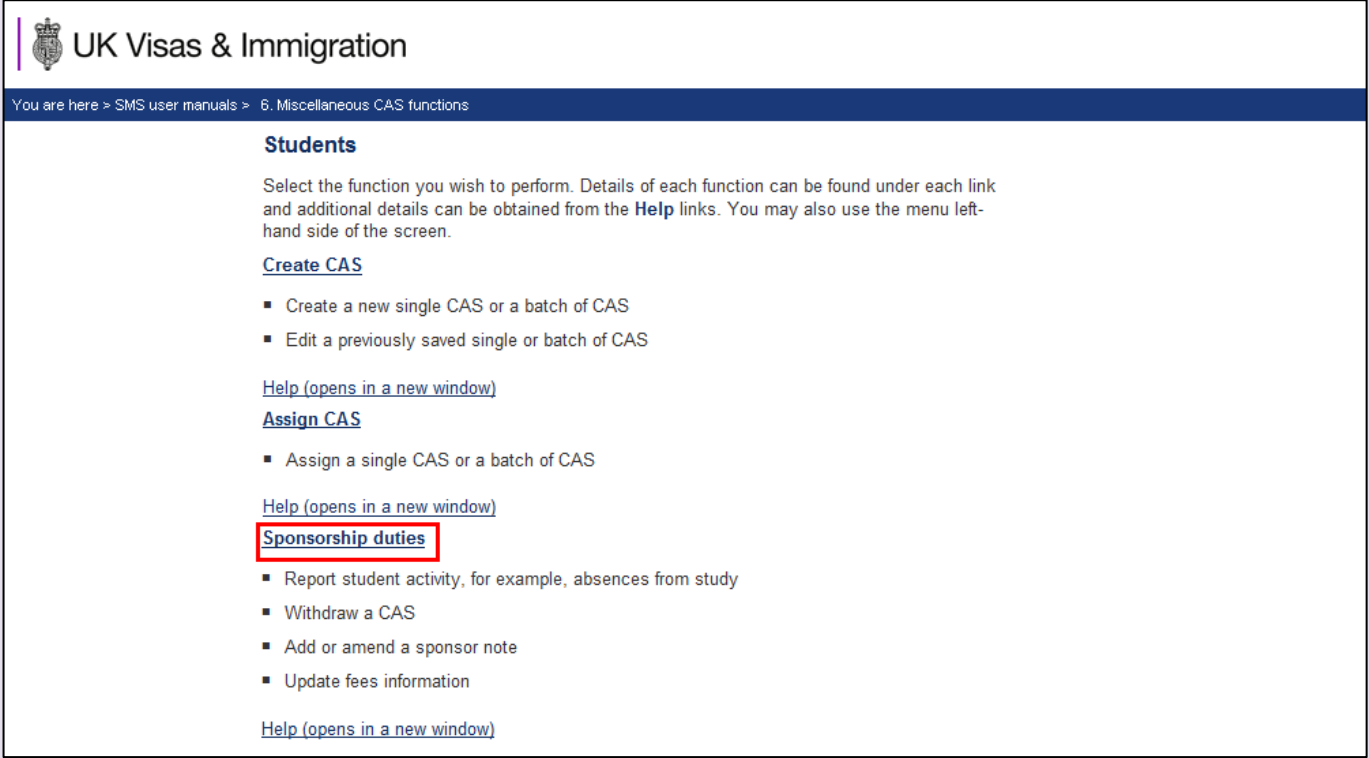
Guide 8: How to withdraw an unused CAS

Follow the step by step instructions below to withdraw an unused CAS. This function is useful if you decide not to sponsor a student before the CAS has been used in an application for leave to enter/remain.

You should read the Sponsorship policy guidance before withdrawing an unused CAS.

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

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Step	Instruction	Screen example
2	From the **Sponsorship duties** screen, select **Manage live CAS by CAS number** if the student's CAS number is known, or **Manage live CAS by CAS search** if you don't know the CAS number.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Sponsorship duties** As a sponsor, you have responsibilities to manage the students to whom you have assigned CAS. This section allows you to fulfil these responsibilities by reporting student activity and managing live CAS. **Please note**, Level 2 users can only report on CAS which they own. **Report activity by CAS number** ▪ Report student activity with a known CAS number Help (opens in a new window) **Report activity by CAS search** ▪ Report student activity by searching on student details Help (opens in a new window) **Manage live CAS by CAS number** ▪ Access the manage a live CAS functions where the CAS number is known ▪ Add or edit a sponsor note, update fees or withdraw a CAS Help (opens in a new window) **Manage live CAS by CAS search** ▪ Access the manage a live CAS functions by searching on student details ▪ Add or edit a sponsor note, update fees or withdraw a CAS Help (opens in a new window)

Step	Instruction	Screen example

		UK Visas & Immigration
		You are here > SMS user manuals > 6. Miscellaneous CAS functions
		Manage live CAS
		Enter the CAS number of the previously assigned CAS you want to manage and choose **Next** to continue. Choose **Back** to return to the previous screen.
		CAS number
		CAS number: [ ]
		Help (opens in a new window)
		[Back] [Next]
3	From the **Manage live CAS** screen, enter the parameters you wish to search against, then select **Next**. The screen example shows both search functions.	**Manage live CAS**
		Enter the search criteria to locate the previously assigned CAS you would like to manage.
		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. For a more advanced search choose **Advanced**, or choose **Back** to return to the **Sponsorship duties** screen.
		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 withdraw. If your search parameters are specific, you will be presented with the screen below.

_____

Step	Instruction	Screen example
4	From the **Manage live CAS** screen, select **Withdraw CAS**.	

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Manage live CAS

Manage the live CAS using the buttons below, choose:

- **Sponsor note** to add a note to a CAS, for example to inform us of a spelling mistake in a name, a change to the passport number or minor changes to the details of the course;
- **Withdraw CAS** to withdraw the CAS before it has been used by the student in an application for leave to enter/remain. This option is only available for CAS with a status of 'Assigned';
- **Update fees** to update the fees; or
- **Back** to return to the previous screen.

Tier and category

Tier 4 (General)

CAS details

CAS number:	E4G7IA7A10X0AX
CAS status:	ASSIGNED

Student details

Passport number:	252566656565
Family name:	Smith
Given name(s):	Jason
Nationality:	COSTA RICA
Date of birth:	23/04/1990
Course start date:	26/02/2014
Course title:	Maths
Boarding fees paid to date (in pounds sterling, using format '1234' or '1234.99'):	
Fees last updated:	
Sponsor note:	

Back   Update fees   Sponsor note   **Withdraw CAS**

_____

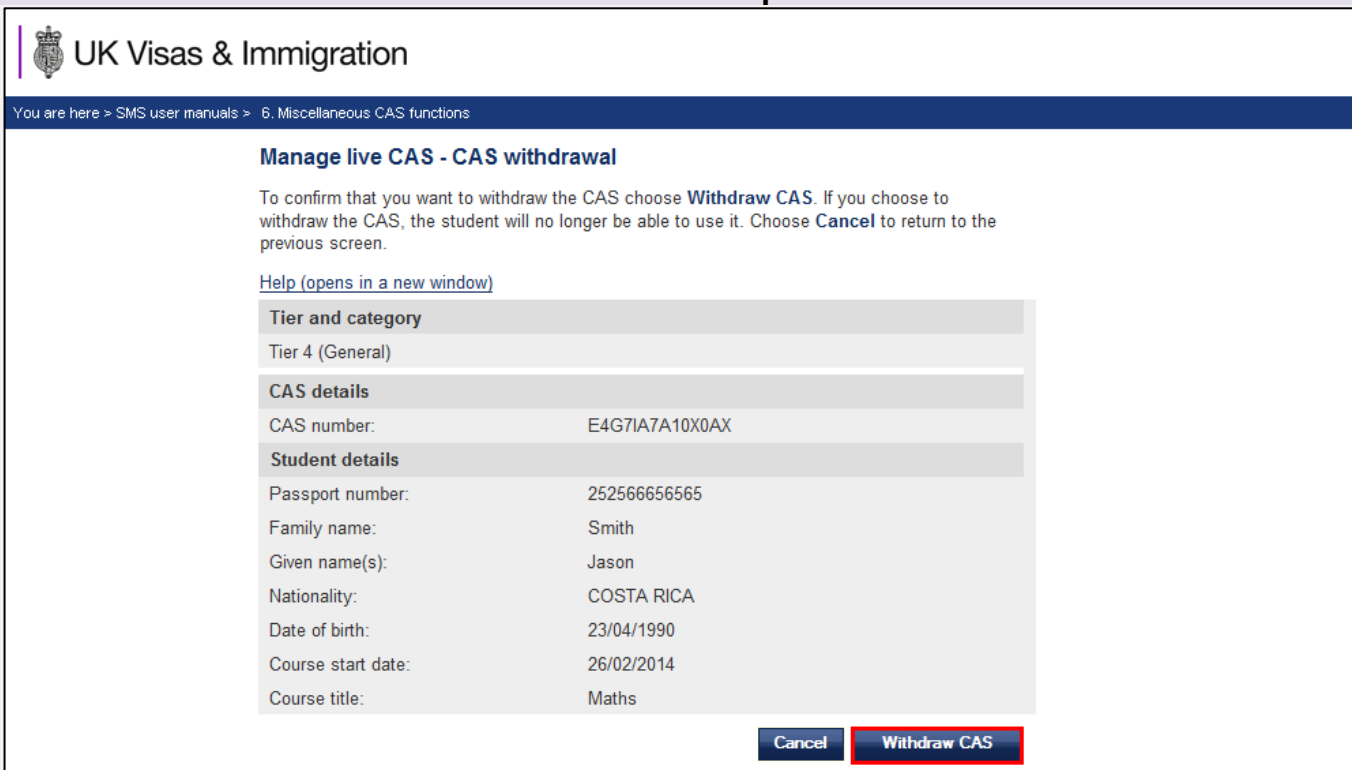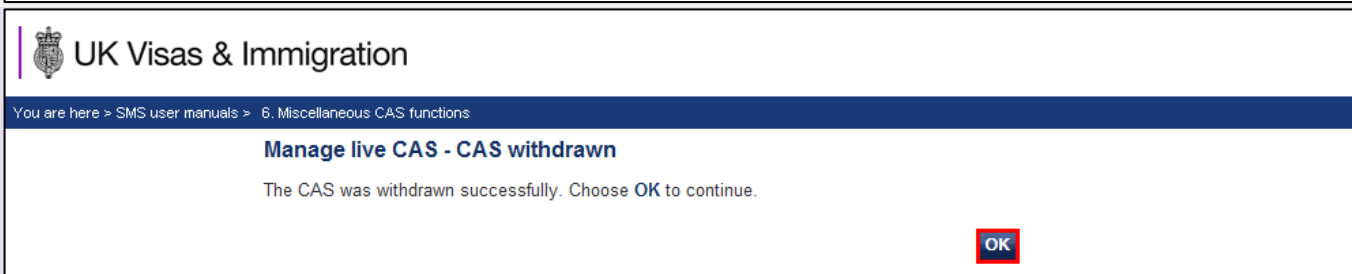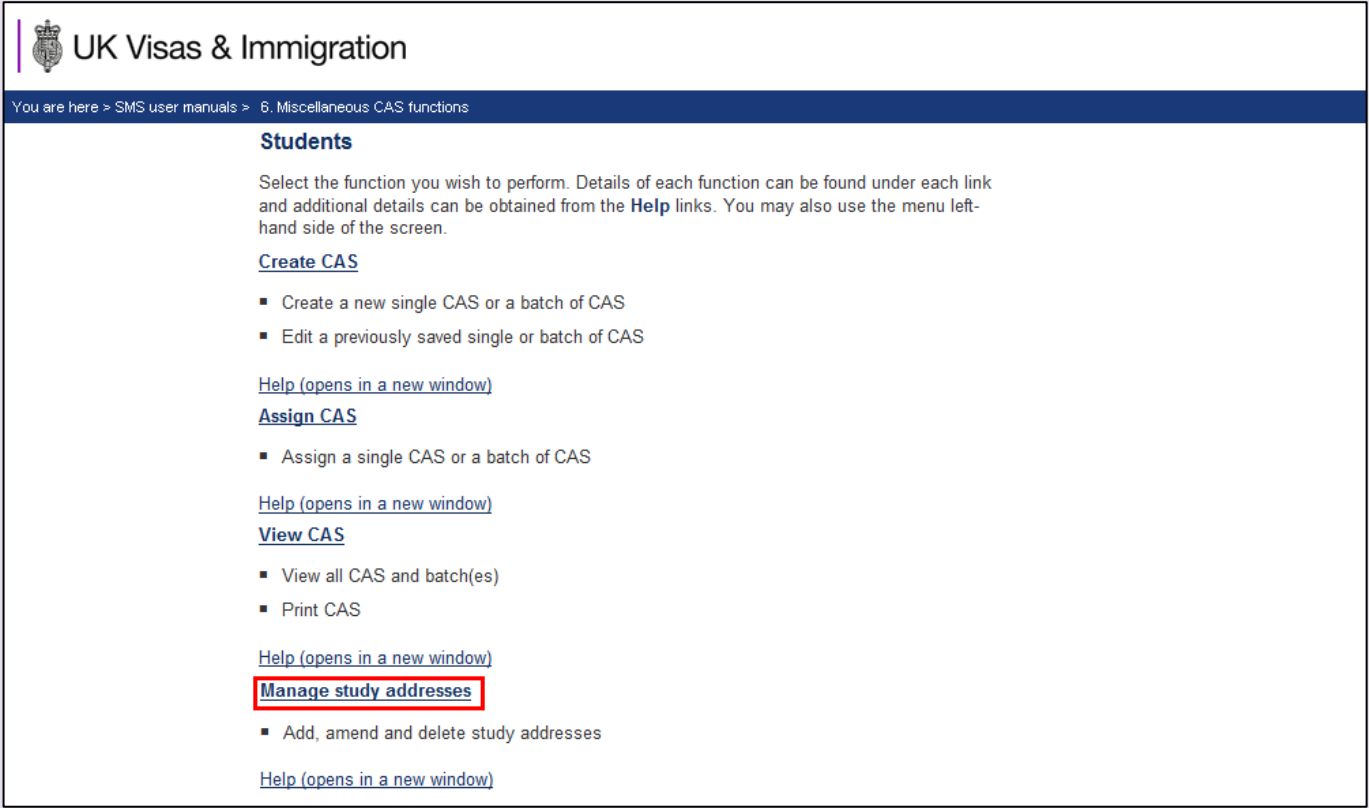| Step	Instruction	Screen example
5	From the **Manage live CAS – CAS withdrawal** screen, select **Withdraw CAS**. If you do not wish to withdraw the CAS, select **Cancel**.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Manage live CAS - CAS withdrawal** To confirm that you want to withdraw the CAS choose **Withdraw CAS**. If you choose to withdraw the CAS, the student will no longer be able to use it. Choose **Cancel** to return to the previous screen. Help (opens in a new window) **Tier and category** Tier 4 (General) **CAS details** CAS number: E4G7IA7A10X0AX **Student details** Passport number: 252566656565 Family name: Smith Given name(s): Jason Nationality: COSTA RICA Date of birth: 23/04/1990 Course start date: 26/02/2014 Course title: Maths Cancel **Withdraw CAS**
6	The CAS has now been withdrawn. Select **OK** to return to the **Sponsorship duties** screen.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Manage live CAS - CAS withdrawn** The CAS was withdrawn successfully. Choose **OK** to continue. OK

_____

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Guide 9: How to add, amend or delete a study address

Follow the step by step instructions below to add, amend or delete a study address. This function is useful if you wish to store several addresses that you frequently use in CAS to save time when creating additional CAS records.

You should read the [Sponsorship policy guidance](#) before adding, editing or deleting a study address.

Step	Instruction	Screen example
1	From the **Students** screen, select **Manage study addresses**.	

_____

Step	Instruction	Screen example

| 2 | From the **Manage study addresses** screen, select **Add** to add a new address, or to delete or edit an existing address, select the **Address identifier**. | |

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Manage study addresses

Manage your saved study addresses or add new addresses. Any saved study addresses are shown below.

The **Address identifier** can be chosen to edit a saved address, or choose **Add** to add a new address. When choosing an **Address identifier**, it is recommended that you choose something meaningful, such as a road, building name, department or campus, so that it can be easily identified when completing a CAS or editing the study address.

Choose **Back** to return to the **Students** home page.

Please note: changes made here will not take effect in any CAS that you have already assigned using an address from this list, nor does adding a new work address from this screen constitute our approval of a new branch, linked entity or partner institution. If you wish to add a branch, linked entity or partner institution to your licence, please do so by selecting **Request any other change to your licence details** from the **Request change to licence details** menu.

Study addresses

Address identifier	Address line 1	City or town
Espresso Court	2 Espresso Court	Sheffield
Latte Lane	1 Latte Lane	Sheffield

Add

Back

Add

Back

_____

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Step	Instruction	Screen example

		UK Visas & Immigration
		You are here > SMS user manuals > 6. Miscellaneous CAS functions
	To add an address:	**Add study address**
		Complete the fields below to add a new study address. Fields marked with an asterisk (*) are mandatory and must be completed. When choosing an **Address identifier**, it is recommended that you choose a meaningful name, such as a road, building name, department or campus, as this will make it easier to identify the correct address when completing a CAS or editing the study address.
3	From the **Add study address** screen, ensure you complete all mandatory details, then select **Save**.	Choose **Save** to add the address to the list, or **Cancel** to return to the Manage study addresses screen.
		Study address
		Address identifier *
		Help (opens in a new window)
		Address: *
		City or town: *
		County, area district or province:
		Postcode or ZIP code: *
		Country: * Please select
		Cancel Save

| **4** | The **Study address saved** screen is displayed. Select **OK** to return to the **Manage study addresses** screen.

Repeat this process to add more addresses. | **UK Visas & Immigration**
You are here > SMS user manuals > 6. Miscellaneous CAS functions
Study address saved
The study address selected has been saved, choose **OK** to continue.
OK |

_____

Step	Instruction	Screen example
5	*To delete or edit an address:* From the **Edit study address** screen, change the address details, as necessary, then select **Save**. You will be returned to the **Manage study address** screen. To delete the address, select **Delete**.	

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Edit study address

Edit the fields below to amend a study address. Fields marked with an asterisk (*) are mandatory and must be completed. When choosing an **Address identifier**, it is recommended that you choose a meaningful name, such as a road, building name, department or campus, as this will make it easier to identify the correct address when completing a CAS or editing the study address.
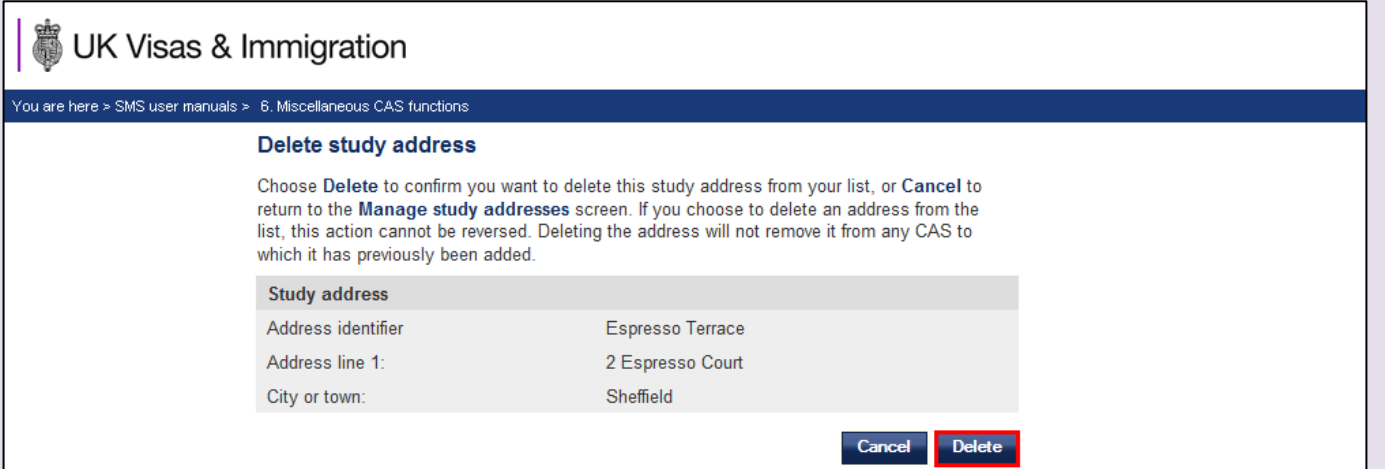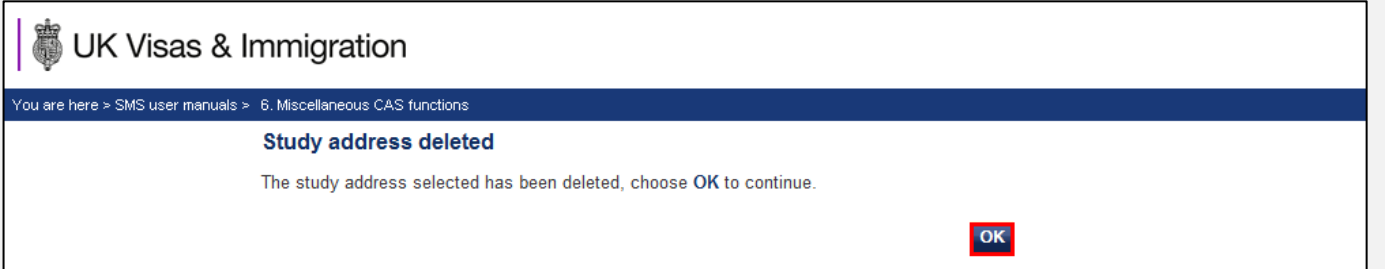
Choose **Save** to add the address to the list, or **Cancel** to return to the Manage study addresses screen.

Study address

Address identifier	*	Espresso Court
Address:	*	2 Espresso Court
City or town:	*	Sheffield
County, area district or province:		
Postcode or ZIP code:	*	S1 1AS
Country:	*	UNITED KINGDOM

Cancel Delete Save

Note At least one field must be changed to be able to **Save**.

_____

Step	Instruction	Screen example
6	*To delete:* From the **Delete study address** screen, select **Delete**.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Delete study address** Choose **Delete** to confirm you want to delete this study address from your list, or **Cancel** to return to the **Manage study addresses** screen. If you choose to delete an address from the list, this action cannot be reversed. Deleting the address will not remove it from any CAS to which it has previously been added. **Study address** Address identifier — Espresso Terrace Address line 1: — 2 Espresso Court City or town: — Sheffield Cancel Delete
7	*To delete*: The study address has been deleted. Select **OK** to return to the **Manage study address** screen.	**UK Visas & Immigration** You are here > SMS user manuals > 6. Miscellaneous CAS functions **Study address deleted** The study address selected has been deleted, choose **OK** to continue. OK

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