The sponsorship management system (SMS) manuals

Step by step guide for sponsors

Manual 8 of 12: Creating and assigning CoS

Contents

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Additional SMS manuals

There are 12 SMS manuals available, plus two supplementary policy guides 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 & managing user access	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 plan	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	[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

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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.

CoS status

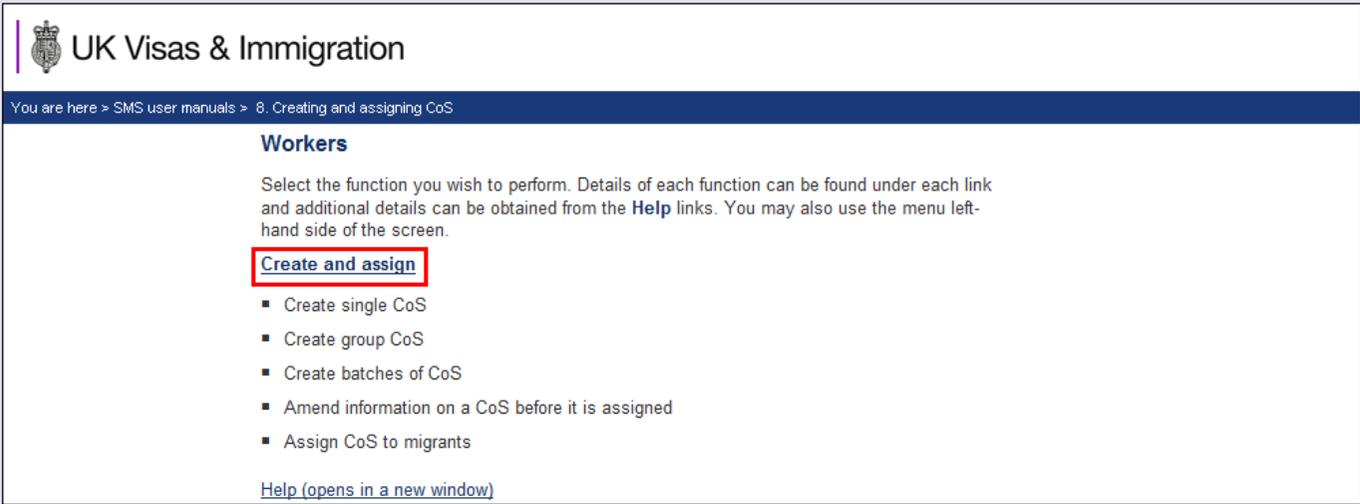The table below shows each status which can apply to a CoS.

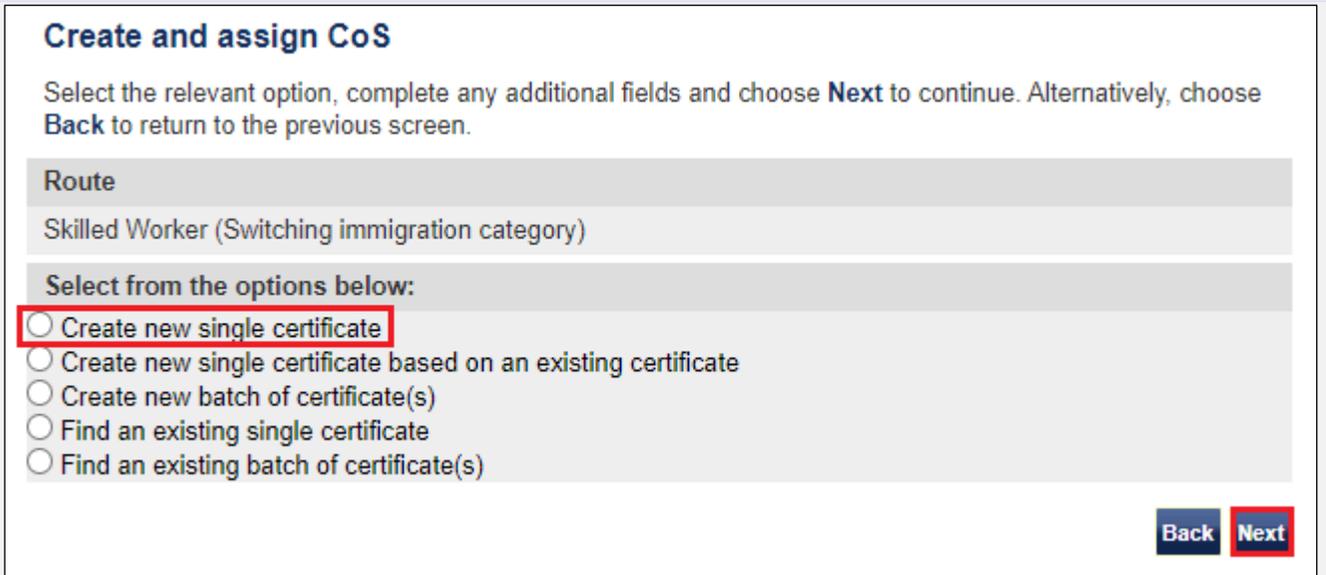| As seen in SMS	Meaning
WORK IN PROGRESS	The CoS is still in 'draft' form as one or more mandatory details have yet to be completed.
READY TO GO	All mandatory fields are complete and the CoS is ready to be assigned to an individual.
ASSIGNED	The CoS has been assigned to an individual and is ready to 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 create and assign an individual CoS

Follow the step by step instructions below to prepare and assign an **undefined CoS** within Worker or Temporary Worker routes.

You should read the [SMS guide 8a – Creating a CoS – guide for business sponsors](#) and [Sponsorship policy guidance](#) before creating and assigning CoS.

Step	Instruction	Screen example
1	From the **Workers** screen, select **Create and assign**.	

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Step	Instruction	Screen example
2	From the **Create and assign CoS** screen, use the **Select the route** drop-down menu to select the route of the CoS you wish to create, then select **Next**. *For Skilled Worker and Global Business Mobility Routes:* **If you select either *Skilled Worker and Global Business Mobility Routes*, an additional drop-down menu will be displayed.** Use the **Select the category** drop-down menu to select the relevant category of the CoS you wish to create, then select **Next**.	**Create and assign CoS** Select the relevant route and category (if applicable) in which you wish to create the CoS, then choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. If you are intending to assign a CoS in either the Skilled Worker or Intra-company Routes, you may have to make an additional payment known as the Immigration Skills Charge (ISC). If you are unsure whether you need to pay this charge, please refer to the ISC eligibility checker, available <u>here</u>. Please note, the checker will help you to determine whether the ISC will be incurred but it will not calculate any amount payable. For this you will need to create and save a CoS in an 'ISC liable' category and proceed to the **Online payment** screen, where any ISC charge will be displayed. No payment will be taken unless you complete the subsequent online payment process. **Route** Select the route [Please select ▾] Back Next
3	From the **Create and assign CoS** screen, select the radio button next to **Create new single certificate**, then select **Next**.	**Create and assign CoS** Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. **Route** Skilled Worker (Switching immigration category) **Select from the options below:** ○ Create new single certificate ○ Create new single certificate based on an existing certificate ○ Create new batch of certificate(s) ○ Find an existing single certificate ○ Find an existing batch of certificate(s) Back Next

Step	Instruction	Screen example
4	From the **Create a CoS** screen, complete the migrant's personal details, those of the job you intend them to do and all other relevant details, then select **Save**.	**Create a CoS** Fields marked with an asterisk (*) are mandatory and must be completed to assign a CoS. Some optional fields will become mandatory when associated fields are populated, for example it is not mandatory to give details of an agent used to source a migrant unless you tick the box to say that an agent has been used. To save the CoS choose **Save**. 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. **The initial sections are the migrant's details. Where applicable, complete the personal information as shown in their passport.** **Route** Skilled Worker (Switching immigration category) **Personal information** Family name: * Given name(s): Other names: Nationality: * Please select Place of birth: * Country of birth: * Please select Date of birth: * Gender: * Please select Country of residence: * Please select **Passport or travel document** Passport number: * Issue date: * Expiry date: * Place of issue of passport: *
Note	All information must be correct and where applicable, must be the same as shown in the individual's passport.	

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Step	Instruction	Screen example

Step	Instruction	Screen example
5	From the **Confirmation of saved CoS** screen, select **Assign**. If you wish to make further changes, select **Amend**.	**Confirmation of saved CoS** From the options below, choose: - **Amend** to edit information on the CoS; - **Assign** to pay for and assign the CoS. This option will only be available if all mandatory fields in the CoS have been completed. Once a CoS has been assigned it cannot be amended; - **Link** to link the CoS into a batch, or **Link to group** to link the CoS into a group. These options will only be available where appropriate; - **Delete** to delete the CoS; or - **Exit** to return to the previous screen. **Route** Skilled Worker (Switching immigration category) **CoS summary** Passport number: 321654 Family name: Smith Given name(s): Nationality: AUSTRALIA Date of birth: 19/12/1938 Gender: Male Exit Link Assign Amend Delete

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Step	Instruction	Screen example
6a	From the **Confirm CoS details before assigning** screen, check to ensure ensure the entered on the CoS details are correct.	**Confirm CoS details before assigning** Check the information and choose **Assign CoS** to assign the CoS. If you do not want to continue choose **Back**. Before you assign a CoS to a Skilled Worker, you should consult the guidance on overseas criminal records checks on GOV.UK, which applies to applicants being sponsored in certain occupation codes. If an applicant is subject to this requirement and you do not make them aware of this at the point their CoS is assigned, there is a risk that the prospective employee's application for entry clearance (a visa) may be delayed or refused. **CoS allocation** The current allocation you hold against the route you are going to assign this CoS under is shown below. You will not be able to assign this CoS if you have used all of your allocation. | Route:	Skilled Worker
Limit:	99
Unused:	93	 **CoS summary** Route Skilled Worker (Switching immigration category)
6b	Read the declaration and tick to indicate your agreement with the terms and conditions When complete, select **Assign CoS**	h. If the worker will be applying for permission on the Skilled Worker route, I have checked the worker's occupation code to ascertain whether it is one to which the overseas criminal records certificate requirement applies and, where it does, I have informed the applicant of their responsibility under this requirement. i. The information provided by me to you will be treated in confidence but it may be disclosed to other law enforcement agencies, UK government departments, agencies, local authorities, foreign governments and other bodies for immigration or research purposes and to help them to carry out their functions. j. I understand you may ask for or check information from other law enforcement agencies, government departments, agencies, local authorities, the police, foreign governments and other bodies for immigration, research or security purposes or to help you process this application or monitor my ongoing compliance with my sponsor duties. k. I agree that you may use the information given in this application for training and research purposes. I agree to the terms and conditions: ☐ Back Assign CoS

Step	Instruction	Screen example
7	The **Online payment** screen is now displayed. Select **OK** to proceed with the transaction. This will open a third party payment service (Worldpay).	**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 CoS has been assigned. The CoS number will then be available for you to give to the worker. The following cards will be accepted: VISA VISA MasterCard Maestro AMERICAN EXPRESS SOLO Electronic payments are powered by: payments powered by **WorldPay** 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. **Payment amount** CoS fee — 199.00 Immigration Skills Charge (ISC) — 1000.00 Amount: — 1199.00 Cancel OK

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Step	Instruction	Screen example
8	From the **Single CoS assigned** screen you can see that the CoS has been assigned and given a unique CoS number.	**Single CoS assigned** The CoS has been assigned. You should take a note of the CoS number and then give the number to the migrant. Choose **OK** to continue. With immediate effect, you should check the applicant's SOC code, and if it is one prescribed as being subject to the overseas criminal record certificate requirement as of April 2017, ensure that you have informed the applicant of this when assigning their COS. As COS are valid for three months, it is possible that they may make their entry clearance application on or after the date the new requirement takes effect and so applicants will benefit from being made aware of this at the point the COS is assigned. The list of SOC codes affected can be found at this link. **Route** Skilled Worker (Extensions - ISC liable) **CoS number** CoS number: C2G9F88501A Date assigned: 10 April 2024 Expiry date (use by): 11 July 2024 Immigration Skills Charge (ISC): 546.00 ISC payment reference: ISC00005061 **CoS summary** Passport number: 123456X Family name: Smith Given name(s): Nationality: ALBANIA Date of birth: 19/06/1973 Sex: Male Work start date: 17 April 2024 Work end date 19 June 2025 OK

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Guide 2: How to create an individual CoS based on an existing CoS

Follow the step by step instructions below to create a CoS based on an existing CoS. This function is useful if you wish to assign a CoS to extend their employment, as the migrant's details will be pre-populated.

You should read the [SMS guide 8a – Creating a CoS – guide for business sponsors](#) and [Sponsorship policy guidance](#) before creating and assigning CoS.

Step	Instruction	Screen example
1	From the **Workers** screen select **Create and assign**.	

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Step	Instruction	Screen example
2	From the **Create and assign CoS** screen, use the **Select the route** drop-down menu to select the route of the CoS you wish to create, then select **Next**. *For General Skilled Worker and Global Business Mobility Routes:* If you select either *Skilled Worker or Global Business Mobility Routes*, an additional drop-down menu will be displayed. Use the **Select the category** drop-down menu to select the relevant category of the CoS you wish to create, then select **Next**.	**Create and assign CoS** Select the relevant route and category (if applicable) in which you wish to create the CoS, then choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. If you are intending to assign a CoS in either the Skilled Worker or Intra-company Routes, you may have to make an additional payment known as the Immigration Skills Charge (ISC). If you are unsure whether you need to pay this charge, please refer to the ISC eligibility checker, available here. Please note, the checker will help you to determine whether the ISC will be incurred but it will not calculate any amount payable. For this you will need to create and save a CoS in an 'ISC liable' category and proceed to the **Online payment** screen, where any ISC charge will be displayed. No payment will be taken unless you complete the subsequent online payment process. **Route** Select the route [Please select ▾] Back Next
3	From the **Create and assign CoS** screen, select the radio button next to **Create new single certificate based on an existing certificate**, then select **Next**.	**Create and assign CoS** Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. **Route** Skilled Worker (Switching immigration category) Select from the options below: ○ Create new single certificate ○ Create new single certificate based on an existing certificate ○ Create new batch of certificate(s) ○ Find an existing single certificate ○ Find an existing batch of certificate(s) Back Next

Step	Instruction	Screen example

Create and assign CoS

Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen.

Route
Skilled Worker (Switching immigration category)

Select from the options below:

- ○ Create new single certificate
- ◉ Create new single certificate based on an existing certificate
- ○ Create new batch of certificate(s)
- ○ Find an existing single certificate
- ○ Find an existing batch of certificate(s)

Find an existing single certificate

Passport number:

Family name:

Given name(s):

Date of birth:

Help (opens in a new window)

Back   Next

4 — From the **Create and assign CoS** screen, enter the search parameters for the original CoS from which you wish to copy the personal details, then select **Next**.

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

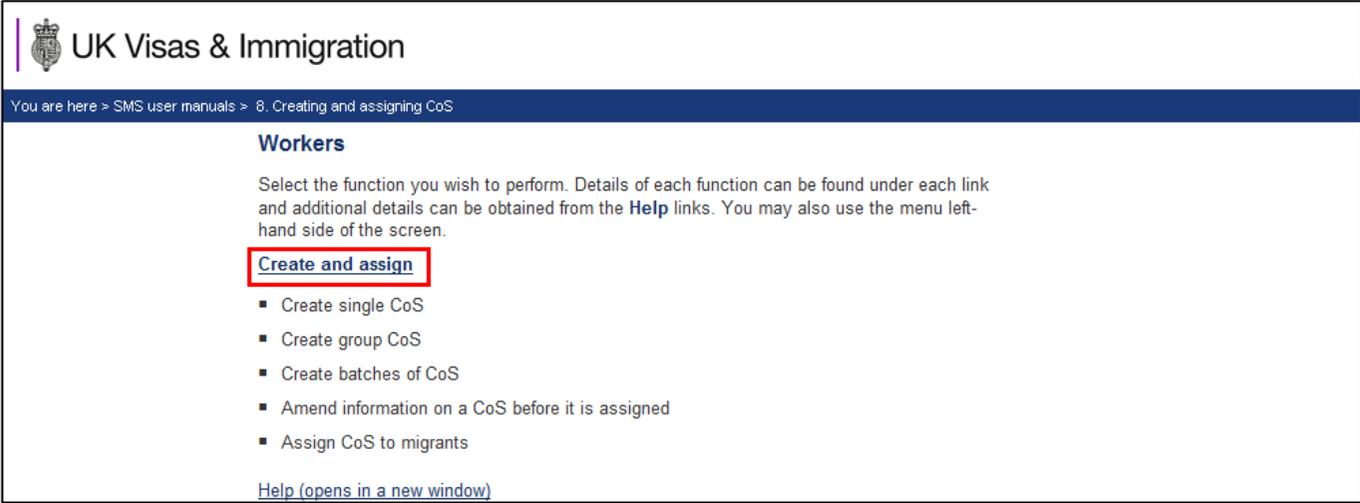| Step	Instruction	Screen example
5	On the **Create a CoS** screen, the migrant's information is already populated. Complete the employment details and all other relevant fields, then select **Save**.	**Create a CoS** Fields marked with an asterisk (*) are mandatory and must be completed to assign a CoS. Some optional fields will become mandatory when associated fields are populated, for example it is not mandatory to give details of an agent used to source a migrant unless you tick the box to say that an agent has been used. To save the CoS choose **Save**. 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. **The initial sections are the migrant's details. Where applicable, complete the personal information as shown in their passport.** **Route** Skilled Worker (Switching immigration category) **Personal information** Family name: * `Smith` Given name(s): `Brian` Other names: `_____` Nationality: * `AUSTRALIA ▾` Place of birth: * `Sydney` Country of birth: * `AUSTRALIA ▾` Date of birth: * `19 ▾` `December ▾` `1938 ▾` Gender: * `Male ▾` Country of residence: * `AUSTRALIA ▾`

Step	Instruction	Screen example
6	The **Confirmation of saved CoS** screen is displayed. The creation of a new CoS is confirmed. You can now: • Select **Assign** to assign the CoS; • Select **Amend** to amend the CoS; • Select **Link** to link to CoS to a batch or group; • Select **Exit** to return to the previous screen; or • Select **Delete** to delete the CoS if it is no longer required (you can only delete a CoS before it is assigned).	**Confirmation of saved CoS** From the options below, choose: ▪ **Amend** to edit information on the CoS; ▪ **Assign** to pay for and assign the CoS. This option will only be available if all mandatory fields in the CoS have been completed. Once a CoS has been assigned it cannot be amended; ▪ **Link** to link the CoS into a batch, or **Link to group** to link the CoS into a group. These options will only be available where appropriate; ▪ **Delete** to delete the CoS; or ▪ **Exit** to return to the previous screen. **Route** Skilled Worker (Switching immigration category) **CoS summary** Passport number: 321654 Family name: Smith Given name(s): Nationality: AUSTRALIA Date of birth: 19/12/1938 Gender: Male Exit Link Assign Amend Delete
Note	You may receive a message alerting you that a CoS may already exist for this person. This is because you are creating a CoS based on the person details from an earlier CoS, but it will not prevent you from assigning the new CoS.	

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Guide 3: How to create and assign a batch of CoS

Follow the step by step instructions below to create a batch of CoS, add CoS to a batch and then assign a batch.

Creating and using batches can save time as CoS can be added with pre-populated employment details. Once complete, the batch can be assigned and paid for with a single transaction.

You should read SMS guide 8a – Creating a CoS – guide for business sponsors and Sponsorship policy guidance before creating and assigning batches of CoS.

Step	Instruction	Screen example
1	From the **Workers** screen, select **Create and assign**.	

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Step	Instruction	Screen example
2	From the **Create and assign CoS** screen, use the **Select the route** drop-down menu to select the route of the CoS you wish to create, then select **Next**. *For Skilled Worker and Global Business Mobility Routes:* If you select either *Skilled Worker and Global Business Mobility Routes*, an additional drop-down menu will be displayed. Use the **Select the category** drop-down menu to select the relevant category of the CoS you wish to create, then select **Next**.	**Create and assign CoS** Select the relevant route and category (if applicable) in which you wish to create the CoS, then choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. If you are intending to assign a CoS in either the Skilled Worker or Intra-company Routes, you may have to make an additional payment known as the Immigration Skills Charge (ISC). If you are unsure whether you need to pay this charge, please refer to the ISC eligibility checker, available <u>here</u>. Please note, the checker will help you to determine whether the ISC will be incurred but it will not calculate any amount payable. For this you will need to create and save a CoS in an 'ISC liable' category and proceed to the **Online payment** screen, where any ISC charge will be displayed. No payment will be taken unless you complete the subsequent online payment process. **Route** Select the route [Please select ⌄] [Back] [Next]
3	From the **Create and assign CoS** screen, select the radio button **Create new batch of certificate(s)**, then select **Next**.	**Create and assign CoS** Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. **Route** Skilled Worker (Switching immigration category) **Select from the options below:** ○ Create new single certificate ○ Create new single certificate based on an existing certificate ○ Create new batch of certificate(s) ○ Find an existing single certificate ○ Find an existing batch of certificate(s) [Back] [Next]

Step	Instruction	Screen example
4	From the **Create and assign CoS** screen, enter the name of the batch, then select **Next**.	**Create and assign CoS** Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. **Route** Skilled Worker (Switching immigration category) **Select from the options below:** ○ Create new single certificate ○ Create new single certificate based on an existing certificate ◉ Create new batch of certificate(s) ○ Find an existing single certificate ○ Find an existing batch of certificate(s) **Create new batch of certificate(s)** Batch name: [＿＿＿＿＿＿＿] Help (opens in a new window) Back Next

Note	Ensure the name of the batch is memorable as you might need to retrieve it later.

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Step	Instruction	Screen example

Batch details

This screen should be used to populate a batch with CoS records. A maximum of 50 CoS can be added to a batch. Choose from the following options:

- **Save batch details** to save any changes made to the batch name.
- **Unlink** to remove a CoS from a batch without deleting the CoS.
- **Edit** to make changes to the CoS.
- **Add** to add a single CoS to the batch.
- **Exit** if you do not want to continue.
- **Add pre-populated CoS** to add a CoS pre-populated with the non-personal details of the last CoS created within this batch.
- **Assign** to assign the batch. Note: all CoS must have a status of **Ready to go** for **Assign** to be active.

On the **Batch details** screen you can now add CoS to the batch.

5 Select either **Add** to add a new CoS, or **Add pre-populated CoS** to add a pre-populated (job-related details) CoS.

Route
Skilled Worker (Switching immigration category)

Batch details	
Batch name: *	Batch A
Help (opens in a new window)	
Number of CoS in batch:	0
Owner:	test, test (HdcozV)
Status:	WORK IN PROGRESS
Date created:	25/11/2020

[Add] [Add pre-populated CoS] [Save batch details]

Details of CoS within batch

Status	Family name	Given name	Date of birth	Nationality	Passport number

[Add] [Add pre-populated CoS]

[Exit] [Assign]

Note The **Add pre-populated CoS** button is only available when there are already CoS in the batch.

Step	Instruction	Screen example
		Create a CoS
		Fields marked with an asterisk (*) are mandatory and must be completed to assign a CoS. Some optional fields will become mandatory when associated fields are populated, for example it is not mandatory to give details of an agent used to source a migrant unless you tick the box to say that an agent has been used.
		To save the CoS choose **Save**. 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.
		The initial sections are the migrant's details. Where applicable, complete the personal information as shown in their passport.
		Route
		Skilled Worker (Switching immigration category)
		Batch details
		Batch name: Batch A
6	From the **Create a CoS** screen, complete the details of the migrant you wish to sponsor, then select **Save**.	**Personal information**
		Family name: *
		Given name(s):
		Other names:
		Nationality: * Please select
		Place of birth: *
		Country of birth: * Please select
		Date of birth: *
		Gender: * Please select
		Country of residence: * Please select
		Passport or travel document
		Passport number: *
		Issue date: *
		Expiry date: *
		Place of issue of passport: *
Note	Pre-populated details can be amended.	

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Step	Instruction	Screen example

Batch details

This screen should be used to populate a batch with CoS records. A maximum of 50 CoS can be added to a batch. Choose from the following options:

- **Save batch details** to save any changes made to the batch name.
- **Unlink** to remove a CoS from a batch without deleting the CoS.
- **Edit** to make changes to the CoS.
- **Add** to add a single CoS to the batch.
- **Exit** if you do not want to continue.
- **Add pre-populated CoS** to add a CoS pre-populated with the non-personal details of the last CoS created within this batch.
- **Assign** to assign the batch. Note: all CoS must have a status of **Ready to go** for **Assign** to be active.

7

You are returned to **Batch details** screen. From the **Details of CoS within batch** heading, you can now see the details of the CoS.

Repeat the steps above to add more CoS to the batch.

When you have finished adding CoS, select **Assign**.

Route

Skilled Worker (Switching immigration category)

Batch details

Batch name:	*	Batch A
Help (opens in a new window)		
Number of CoS in batch:		1
Owner:		test, test (HdcozV)
Status:		READY TO GO
Date created:		25/11/2020

Add | Add pre-populated CoS | Save batch details

Details of CoS within batch

	Status	Family name	Given name	Date of birth	Nationality	Passport number
Unlink Edit	READY TO GO	Smith		01/01/1920	ALBANIA	987654

Add | Add pre-populated CoS

Exit | Assign

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Step	Instruction	Screen example
8	From the **Confirm assignment of batch** screen, read the declaration and tick to indicate your agreement with the terms and conditions When complete, select **Assign**	h. If the worker will be applying for permission on the Skilled Worker route, I have checked the worker's occupation code to ascertain whether it is one to which the overseas criminal records certificate requirement applies and, where it does, I have informed the applicant of their responsibility under this requirement. i. The information provided by me to you will be treated in confidence but it may be disclosed to other law enforcement agencies, UK government departments, agencies, local authorities, foreign governments and other bodies for immigration or research purposes and to help them to carry out their functions. j. I understand you may ask for or check information from other law enforcement agencies, government departments, agencies, local authorities, the police, foreign governments and other bodies for immigration, research or security purposes or to help you process this application or monitor my ongoing compliance with my sponsor duties. k. I agree that you may use the information given in this application for training and research purposes. I agree to the terms and conditions: ☐ Back Assign

_____

Step	Instruction	Screen example
9	The **Online payment** screen is now displayed. Select **OK** to proceed with the transaction. This will open a third party payment service (Worldpay).	**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 CoS has been assigned. The CoS number will then be available for you to give to the worker. The following cards will be accepted: VISA VISA MasterCard Maestro AMERICAN EXPRESS SOLO Electronic payments are powered by: payments powered by **WorldPay** 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. **Payment amount** Batch name: Batch A Number of CoS in batch: 1 Number of CoS in batch to pay for: 1 Total CoS fee 199.00 Total ISC 1000.00 Number of CoS with ISC to pay 1 Amount: 1199.00 Cancel OK

Step	Instruction	Screen example

Step	Instruction
10	On the **Confirmation of assigned batch** screen you can see the unique CoS number of each CoS in the batch.

Confirmation of assigned batch

The batch has been assigned successfully. The batch contents are displayed alphabetically by family name. You should now take a note of the CoS numbers and give them to the migrants. Choose **OK** to continue.

Batch details

Batch name:	Batch A
Number of CoS in batch:	1

Batch contents

CoS number	Family name	Given name	Date of birth	Nationality	Passport number	ISC payment reference	Immigration Skills Charge (ISC)
C2G4K37269A	Smith		01/01/1920	ALBANIA	987654	ISC00000750	1000.00

OK

Guide 4: How to amend, delete or assign a CoS

Follow the step by step instructions below to retrieve a CoS that has not yet been assigned in order to edit, assign or delete it. This function is useful if you have previously created and saved a CoS with partial information.

You should read the [SMS guide 8a – Creating a CoS – guide for business sponsors](#) and [Sponsorship policy guidance](#) before editing and assigning CoS.

Step	Instruction	Screen example
1	From the **Workers** screen select **Create and assign**.	

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Step	Instruction	Screen example
2	From the **Create and assign CoS** screen, use the **Select the route** drop-down menu to select the route of the CoS you wish to retrieve, then select **Next**. *Skilled Worker and Global Business Mobility Routes:* If you select either Skilled Worker or *Global Business Mobility* Routes, an additional drop-down menu will be displayed. Use the **Select the category** drop-down menu to select the relevant category of the CoS you wish to retrieve, then select **Next**.	**Create and assign CoS** Select the relevant route and category (if applicable) in which you wish to create the CoS, then choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. If you are intending to assign a CoS in either the Skilled Worker or Intra-company Routes, you may have to make an additional payment known as the Immigration Skills Charge (ISC). If you are unsure whether you need to pay this charge, please refer to the ISC eligibility checker, available <u>here</u>. Please note, the checker will help you to determine whether the ISC will be incurred but it will not calculate any amount payable. For this you will need to create and save a CoS in an 'ISC liable' category and proceed to the **Online payment** screen, where any ISC charge will be displayed. No payment will be taken unless you complete the subsequent online payment process. **Route** Select the route Please select ⌄ Back Next

_____

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| 3 | From the **Create and assign CoS** screen, select the radio button next to **Find an existing single CoS**, then select **Next**. |

Create and assign CoS

Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen.

Route
Skilled Worker (Switching immigration category)

Select from the options below:
- ○ Create new single certificate
- ○ Create new single certificate based on an existing certificate
- ○ Create new batch of certificate(s)
- ○ Find an existing single certificate
- ○ Find an existing batch of certificate(s)

Back **Next**

Step	Instruction	Screen example

Create and assign CoS

Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen.

Route
Skilled Worker (Switching immigration category)

Select from the options below:

○ Create new single certificate
○ Create new single certificate based on an existing certificate
○ Create new batch of certificate(s)
◉ Find an existing single certificate
○ Find an existing batch of certificate(s)

Find an existing single certificate

Passport number:	[ ]
Family name:	[ ]
Given name(s):	[ ]
Date of birth:	[▾] [▾] [▾]
Help (opens in a new window)	

Back Next

4 — From the **Create and assign CoS** screen, enter the details of the worker, then select **Next**.

Back 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 you wish to find. If your search parameters are specific, you will be presented with the screen below.

_____

Step	Instruction	Screen example
5	From the **Create a CoS** screen, the migrant's information is already populated. If necessary, amend the details, then select **Save**. *To delete*: Select **Delete**. You will be asked to confirmation the deletion. If the **Delete** button is not visible, see *Step 8* below.	**Create a CoS** Fields marked with an asterisk (*) are mandatory and must be completed to assign a CoS. Some optional fields will become mandatory when associated fields are populated, for example it is not mandatory to give details of an agent used to source a migrant unless you tick the box to say that an agent has been used. To save the CoS choose **Save**. 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. **The initial sections are the migrant's details. Where applicable, complete the personal information as shown in their passport.** **Route** Skilled Worker (Switching immigration category) **Personal information** Family name: * `Smith` Given name(s): `Brian` Other names: ` ` Nationality: * `AUSTRALIA` Place of birth: * `Sydney` Country of birth: * `AUSTRALIA` Date of birth: * `19` `December` `1938` Gender: * `Male` Country of residence: * `AUSTRALIA`

_____

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Step	Instruction	Screen example

6

From the **Confirmation of saved CoS** screen, select **Assign**.

If you wish to make further changes, select **Amend**.

To delete:

Select **Delete**. You will be asked to confirmation the deletion.

Confirmation of saved CoS

From the options below, choose:

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

Route

Skilled Worker (Switching immigration category)

CoS summary

Passport number:	321654
Family name:	Smith
Given name(s):	
Nationality:	AUSTRALIA
Date of birth:	19/12/1938
Gender:	Male

Exit | Link | Assign | Amend | Delete

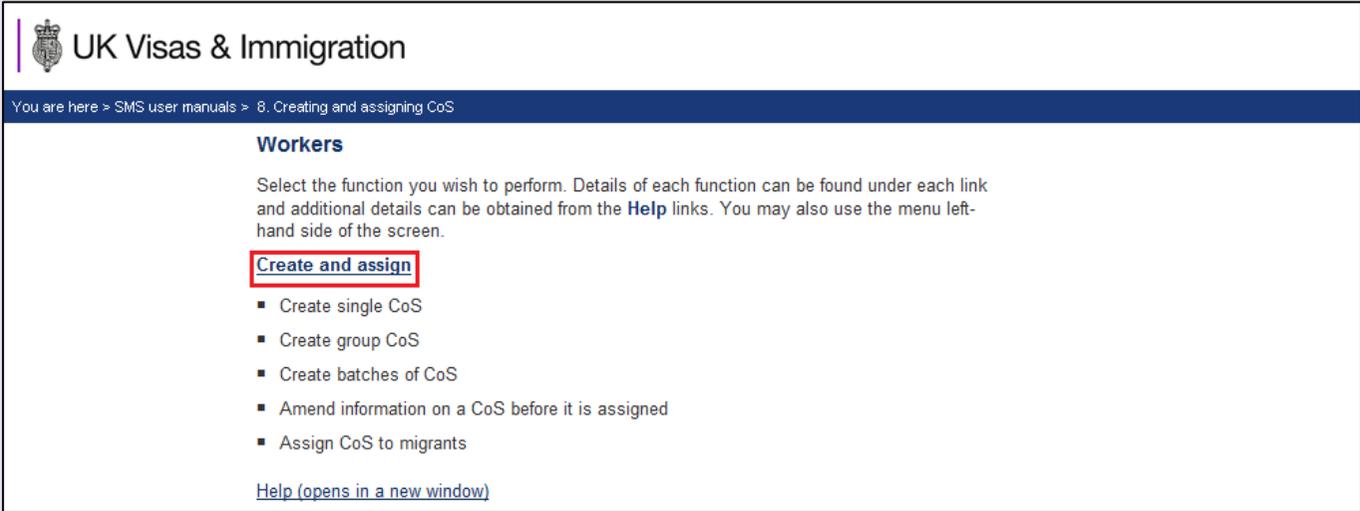| Step	Instruction	Screen example
7a	The **Confirm CoS details before assigning** screen is now displayed. Ensure all the information is correct, as a CoS cannot be amended once it has been assigned.	**Confirm CoS details before assigning** Check the information and choose **Assign CoS** to assign the CoS. If you do not want to continue choose **Back**. Before you assign a CoS to a Skilled Worker, you should consult the guidance on <u>overseas criminal records checks on GOV.UK</u>, which applies to applicants being sponsored in certain occupation codes. If an applicant is subject to this requirement and you do not make them aware of this at the point their CoS is assigned, there is a risk that the prospective employee's application for entry clearance (a visa) may be delayed or refused. **CoS allocation** The current allocation you hold against the route you are going to assign this CoS under is shown below. You will not be able to assign this CoS if you have used all of your allocation. | Route:	Skilled Worker
---	---
Limit:	99
Unused:	93	 **CoS summary** Route Skilled Worker (Switching immigration category)
7b	Read the declaration and tick to indicate your agreement with the terms and conditions When complete, select **Assign CoS**	h. If the worker will be applying for permission on the Skilled Worker route, I have checked the worker's occupation code to ascertain whether it is one to which the overseas criminal records certificate requirement applies and, where it does, I have informed the applicant of their responsibility under this requirement. i. The information provided by me to you will be treated in confidence but it may be disclosed to other law enforcement agencies, UK government departments, agencies, local authorities, foreign governments and other bodies for immigration or research purposes and to help them to carry out their functions. j. I understand you may ask for or check information from other law enforcement agencies, government departments, agencies, local authorities, the police, foreign governments and other bodies for immigration, research or security purposes or to help you process this application or monitor my ongoing compliance with my sponsor duties. k. I agree that you may use the information given in this application for training and research purposes. I agree to the terms and conditions: ☐ Back Assign CoS

Step	Instruction	Screen example
8	The **Online payment** screen is now displayed. Select **OK** to proceed with the transaction. This will open a third party payment service (Worldpay).	**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 CoS has been assigned. The CoS number will then be available for you to give to the worker. The following cards will be accepted: VISA VISA MasterCard Maestro AMERICAN EXPRESS SOLO Electronic payments are powered by: payments powered by **WorldPay** 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. **Payment amount** CoS fee — 199.00 Immigration Skills Charge (ISC) — 1000.00 Amount: — 1199.00 Cancel OK

Step	Instruction	Screen example
9	On the **Single CoS assigned** screen you can see the unique CoS number.	**Single CoS assigned** The CoS has been assigned. You should take a note of the CoS number and then give the number to the migrant. Choose **OK** to continue. With immediate effect, you should check the applicant's SOC code, and if it is one prescribed as being subject to the overseas criminal record certificate requirement as of April 2017, ensure that you have informed the applicant of this when assigning their COS. As COS are valid for three months, it is possible that they may make their entry clearance application on or after the date the new requirement takes effect and so applicants will benefit from being made aware of this at the point the COS is assigned. The list of SOC codes affected can be found at this link. **Route** Skilled Worker (Switching immigration category) **CoS number** CoS number: **C2G4K27269A** Date assigned: 25 November 2020 Expiry date (use by): 26 February 2021 Immigration Skills Charge (ISC) 1000.00 ISC payment reference ISC00000744 **CoS summary** Passport number: 321654 Family name: Smith Given name(s): Nationality: AUSTRALIA Date of birth: 19/12/1938 Gender: Male OK

_____

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Guide 5: How to find and assign an existing batch of CoS

Follow the step by step instructions below to find a batch of CoS, add CoS to the batch (with or without pre-populated details) and assign the batch. This function is useful if you have already created a batch of CoS but now wish to add additional CoS, assign and pay for the batch.

You should read the SMS guide 8a – Creating a CoS – guide for business sponsors and Sponsorship policy guidance before creating and assigning batches of CoS.

Step	Instruction	Screen example
1	From the **Workers** screen select **Create and assign**.	

_____

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Step	Instruction	Screen example

From the **Create and assign CoS** screen, use the **Select the route** drop-down menu to select the route of the batch you wish to find, then select **Next**.

Skilled Worker and Global Business Mobility Routes:

2

If you select either *Skilled Worker and Global Business Mobility Routes*, an additional drop-down menu will be displayed.

Use the **Select the category** drop-down menu to select the relevant category of the batch you wish to find, then select **Next**.

Create and assign CoS

Select the relevant route and category (if applicable) in which you wish to create the CoS, then choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen.

If you are intending to assign a CoS in either the Skilled Worker or Intra-company Routes, you may have to make an additional payment known as the Immigration Skills Charge (ISC). If you are unsure whether you need to pay this charge, please refer to the ISC eligibility checker, available here.

Please note, the checker will help you to determine whether the ISC will be incurred but it will not calculate any amount payable. For this you will need to create and save a CoS in an 'ISC liable' category and proceed to the **Online payment** screen, where any ISC charge will be displayed. No payment will be taken unless you complete the subsequent online payment process.

Route

Select the route

Please select ⌄

Back Next

_____

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Step	Instruction	Screen example
3	From the **Create and assign CoS** screen, select the radio button **Find an existing batch of certificate(s)**.	**Create and assign CoS** Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. **Route** Skilled Worker (Switching immigration category) **Select from the options below:** ○ Create new single certificate ○ Create new single certificate based on an existing certificate ○ Create new batch of certificate(s) ○ Find an existing single certificate ○ Find an existing batch of certificate(s) Back Next

_____

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Step	Instruction	Screen example
4	From the **Create and assign CoS** screen, enter the details of the batch, then select **Next**.	**Create and assign CoS** Select the relevant option, complete any additional fields and choose **Next** to continue. Alternatively, choose **Back** to return to the previous screen. **Route** Skilled Worker (Switching immigration category) **Select from the options below:** ○ Create new single certificate ○ Create new single certificate based on an existing certificate ○ Create new batch of certificate(s) ○ Find an existing single certificate ● Find an existing batch of certificate(s) **Find an existing batch of certificate(s)** 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 list of batches. This screen is not featured in this guide. Select the batch you wish to retrieve. If your search parameters are specific, you will be presented with the screen below. |

_____

5	From the **Batch details** screen, you can now add CoS to the batch. Select either **Add**, to add a new CoS, or **Add pre-populated CoS** to add a pre-populated (job-related data) CoS.	**Batch details** This screen should be used to populate a batch with CoS records. A maximum of 50 CoS can be added to a batch. Choose from the following options: ▪ **Save batch details** to save any changes made to the batch name. ▪ **Unlink** to remove a CoS from a batch without deleting the CoS. ▪ **Edit** to make changes to the CoS. ▪ **Add** to add a single CoS to the batch. ▪ **Exit** if you do not want to continue. ▪ **Add pre-populated CoS** to add a CoS pre-populated with the non-personal details of the last CoS created within this batch. ▪ **Assign** to assign the batch. Note: all CoS must have a status of **Ready to go** for **Assign** to be active. **Route** Skilled Worker (Switching immigration category) **Batch details** Batch name: * Batch A Help (opens in a new window) Number of CoS in batch: 0 Owner: test, test (HdcozV) Status: WORK IN PROGRESS Date created: 25/11/2020 [Add] [Add pre-populated CoS] [Save batch details] **Details of CoS within batch** | Status	Family name	Given name	Date of birth	Nationality	Passport number
---	---	---	---	---	---
						  [Add] [Add pre-populated CoS] [Exit] [Assign]

Note	The **Add pre-populated CoS** button is only available when there are already CoS in the batch.

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Step	Instruction	Screen example
6	From the **Create a CoS** screen, complete the details of the migrant you wish to sponsor, then select **Save**.	**Create a CoS** Fields marked with an asterisk (*) are mandatory and must be completed to assign a CoS. Some optional fields will become mandatory when associated fields are populated, for example it is not mandatory to give details of an agent used to source a migrant unless you tick the box to say that an agent has been used. To save the CoS choose **Save**. 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. **The initial sections are the migrant's details. Where applicable, complete the personal information as shown in their passport.** **Route** Skilled Worker (Switching immigration category) **Batch details** Batch name: Batch A **Personal information** Family name: * Given name(s): Other names: Nationality: * [Please select] Place of birth: * Country of birth: * [Please select] Date of birth: * Gender: * [Please select] Country of residence: * [Please select] **Passport or travel document** Passport number: * Issue date: * Expiry date: * Place of issue of passport: *

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Step	Instruction	Screen example

Batch details

This screen should be used to populate a batch with CoS records. A maximum of 50 CoS can be added to a batch. Choose from the following options:

- **Save batch details** to save any changes made to the batch name.
- **Unlink** to remove a CoS from a batch without deleting the CoS.
- **Edit** to make changes to the CoS.
- **Add** to add a single CoS to the batch.
- **Exit** if you do not want to continue.
- **Add pre-populated CoS** to add a CoS pre-populated with the non-personal details of the last CoS created within this batch.
- **Assign** to assign the batch. Note: all CoS must have a status of **Ready to go** for **Assign** to be active.

Route

Skilled Worker (Switching immigration category)

Batch details

Batch name:	* Batch A
Help (opens in a new window)	
Number of CoS in batch:	1
Owner:	test, test (HdcozV)
Status:	READY TO GO
Date created:	25/11/2020

Add | Add pre-populated CoS | Save batch details

Details of CoS within batch

	Status	Family name	Given name	Date of birth	Nationality	Passport number
Unlink Edit	READY TO GO	Smith		01/01/1920	ALBANIA	987654

Add | Add pre-populated CoS

Exit | Assign

Step 7

You are returned to the **Batch details** screen. From the **Details of CoS within batch** heading, you can now see the details of the CoS.

Repeat the steps above to add more CoS to the batch.

When you have added the CoS you wish to add, select **Assign**.

Step	Instruction	Screen example
8	From the **Confirm assignment of batch** screen, read the declaration and tick to indicate your agreement with the terms and conditions When complete, select **Assign**	

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Step	Instruction	Screen example
9	The **Online payment** screen is now displayed. Select **OK** to proceed with the transaction. This will open a third party payment service (Worldpay).	**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 CoS has been assigned. The CoS number will then be available for you to give to the worker. The following cards will be accepted: [VISA VISA MasterCard Maestro AMERICAN EXPRESS SOLO] Electronic payments are powered by: payments powered by **WorldPay** 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. **Payment amount** Batch name: Batch A Number of CoS in batch: 1 Number of CoS in batch to pay for: 1 Total CoS fee 199.00 Total ISC 1000.00 Number of CoS with ISC to pay 1 Amount: 1199.00 Cancel OK

_____

Step	Instruction	Screen example
10	On the **Confirmation of assigned batch** screen you can see the unique CoS number of each CoS in the batch.	**Confirmation of assigned batch** The batch has been assigned successfully. The batch contents are displayed alphabetically by family name. You should now take a note of the CoS numbers and give them to the migrants. Choose **OK** to continue. **Batch details** Batch name: Batch A Number of CoS in batch: 1 **Batch contents** CoS number: C2G4K37269A, Family name: Smith, Date of birth: 01/01/1920, Nationality: ALBANIA, Passport number: 987654, ISC payment reference: ISC00000750, Immigration Skills Charge (ISC): 1000.00 OK