UK Visas
& Immigration

The sponsorship management system (SMS) manuals

Step by step guide for sponsors

Manual 11 of 12: Temporary Work – Creative Worker groups of CoS

Contents

Additional SMS manuals 3
Glossary 7
CoS status 8
SMS guides 9
Guide 1: How to create and assign a group of CoS 9
Guide 2: How to link and unlink an individual CoS to or from a group 18
Guide 3: How to find a group, add CoS and then assign the group 28
Guide 4: How to transfer a group of CoS to another SMS user 36

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	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 plans	Common	To help sponsors apply for Basic Compliance Assessment and manage action plans.	All sponsors

Manual	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

Manual	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 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	Manual title	Type	Purpose	Audience
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
Manual 13	Multi-factor authentication	Common	To provide sponsor with an extra layer of security for your SMS account	All Sponsors

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
MFA	Multi Factor Authentication
OTP	One Time Passcode

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 in SMS and is ready to use 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 routes / your whole licence prior to the CoS being used.

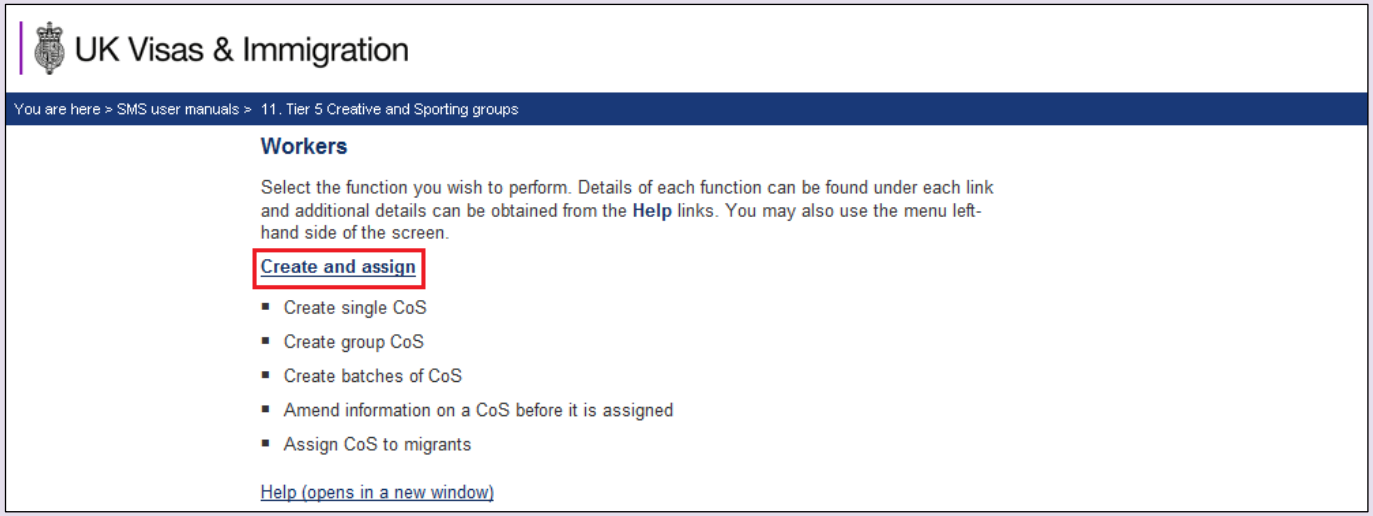
SMS guides

Guide 1: How to create and assign a group of CoS

Follow the step by step instructions below to create and assign a group. This function may be useful if you wish to create a group of CoS for an event, such as a concert. A group is similar to a batch but only applies to the **Temporary Work – Creative Worker** route.

A group of CoS can be based either on a lead applicant (such as a lead singer) or as a group without a lead applicant. The key question to ask in deciding which option to choose is 'will the event go ahead if the lead applicant does not enter the UK?' You should identify a lead applicant on whom to base the CoS group if the answer to this question is 'no'.

You should read the Sponsorship policy guidance before creating and assign a group.

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

Step	Instructions	Screen example
2	From the **Create and assign CoS** screen, use the **Select the route** drop-down menu to select **Temporary Work - Creative Worker**, 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** select **Create new group 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 Temporary Work - Creative Worker Select from the options below: ○ Create new single certificate ○ Create new single certificate based on an existing certificate ○ Create new batch of certificate(s) ○ Create new group of certificate(s) ○ Find an existing single certificate ○ Find an existing batch of certificate(s) ○ Find an existing group of certificate(s) Back Next

Step	Instructions	Screen example
4	From the **Create and assign CoS** screen, enter the name of the group you wish to create in the **Group name** text box, then select the type of group from the drop-down menu. Select **Next**.	

Route

Temporary Work - Creative Worker

Group summary

Group name: New group

Group information

Tick to confirm if the migrant is a lead member of the group: ☐

Tick to confirm that the migrant is already established as a member of the group: ☐

Country from which application is being made:

* Please select

Post from which application is being made:

* Please select

Personal information

Family name: *

Given name(s):

Other names:

Nationality:

* Please select

Place of birth: *

Country of birth:

* Please select

Date of birth: *

Sex: * Please select

Note A group of CoS can be based either on a lead applicant (such as a lead singer) or as a group without a lead applicant. The key question to ask in deciding which option to choose is ‘will the event go ahead if the lead applicant does not enter the UK?’ You should identify a lead applicant on whom to base the CoS group if the answer to this question is ‘no’.

Step	Instructions	Screen example
5	From the **Create a group of CoS** screen, enter the group's purpose in the UK and further details in the appropriate fields, then select **Add CoS**.	

Create a group of CoS

After the first CoS has been created, any subsequent CoS added will be pre-populated with selected data which may be common to the group. The pre-populated data should be checked and can be amended, where necessary. From the options below, choose:

- **Save group** to save the details of the group (for example, the name of the group, purpose in the UK, etc);
- **Add CoS** to add a new CoS to the group. You can unlink the CoS from the group, but you cannot delete the CoS once it has been saved;
- **Unlink** to remove a CoS from the group;
- **Edit** to amend the CoS; or
- **Assign group** to pay for and assign the CoS in the group.

Route

Temporary Work - Creative Worker

Group details

Group name: * New Group

Help (opens in a new window)

Number of CoS in group: 0

Type of group (choose 'Lead Applicant Group' if the group cannot perform without one or more of its members): * Lead Applicant Group

Group purpose in the UK: *

Give details of what the group will be doing while in the UK: *

Tick to confirm that the group is already established as a group and has performed overseas:

Add CoS | Save group

Group

Unlink/edit	Passport number	Family name	Given name	Date of birth	Nationality	Lead migrant?	Status

Add CoS

Exit | Assign group

Note The **Save group** button only needs to be selected when changes have been made to the Group details (lead applicant, purpose, etc). You do not need to save the group when adding a CoS.

Step	Instructions	Screen example
6	From the **Create a CoS** screen, enter the details of the first member of the group. When all mandatory fields have been completed, select **Save**.	**Route** Temporary Work - Creative Worker **Group summary** Group name: New group **Group information** Tick to confirm if the migrant is a lead member of the group: ☐ Tick to confirm that the migrant is already established as a member of the group: ☐ Country from which application is being made: * Please select Post from which application is being made: * Please select **Personal information** Family name: * Given name(s): Other names: Nationality: * Please select Place of birth: * Country of birth: * Please select Date of birth: * Sex: * Please select

Step	Instructions	Screen example
7	From the **Create a group of CoS** screen, the **Group** table now displays that the first member has been added to the group. • To add more CoS to the group, select **Add CoS** and repeat the steps above. • To assign and pay for the group, select **Assign group**. Before you can assign the group, you must ensure that the **Group details** have been completed.	

Create a group of CoS

After the first CoS has been created, any subsequent CoS added will be pre-populated with selected data which may be common to the group. The pre-populated data should be checked and can be amended, where necessary. From the options below, choose:

- **Save group** to save the details of the group (for example, the name of the group, purpose in the UK, etc);
- **Add CoS** to add a new CoS to the group. You can unlink the CoS from the group, but you cannot delete the CoS once it has been saved;
- **Unlink** to remove a CoS from the group;
- **Edit** to amend the CoS; or
- **Assign group** to pay for and assign the CoS in the group.

Route

Temporary Work - Creative Worker

Group details

Group name: * New Group

Help (opens in a new window)

Number of CoS in group: 1

Type of group (choose 'Lead Applicant Group' if the group cannot perform without one or more of its members): * Lead Applicant Group

Group purpose in the UK: * Concerts

Give details of what the group will be doing while in the UK: * Performing in theatres

Tick to confirm that the group is already established as a group and has performed overseas: ☑

Add CoS | Save group

Group

Unlink/edit	Passport number	Family name	Given name	Date of birth	Nationality	Lead migrant?	Status
Unlink Edit	Group1	Smith	Bob	18/12/1939	AUSTRIA	Y	READY TO GO

Add CoS

Exit | Assign group

Step	Instructions	Screen example
8	On the **Confirm group before assigning** screen read the declaration and tick to indicate your agreement. Select **Assign group**.	

Confirm group before assigning

Check the information and choose **Assign group** to assign the CoS in the group.

CoS allocation

Please review the number of CoS used and your allocation limit for this allocation year.

Route:	Temporary Work - Creative Worker
Limit:	100
Unused:	100

Group

Group name:	New Group
Number of CoS in group:	1
Type of group:	Lead Applicant Group

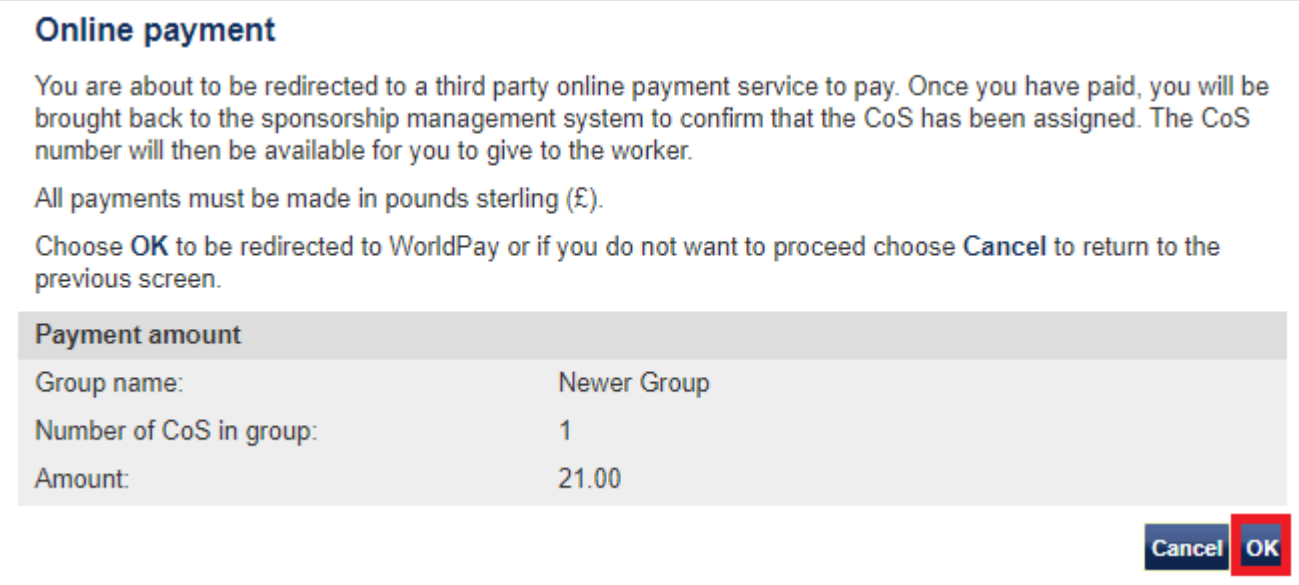
i. The information provided by me to you will be treated in confidence but it may be disclosed to other law enforcement agencies, UK government departments, agencies, local authorities, foreign governments and other bodies for immigration or research purposes and to help them to carry out their functions.

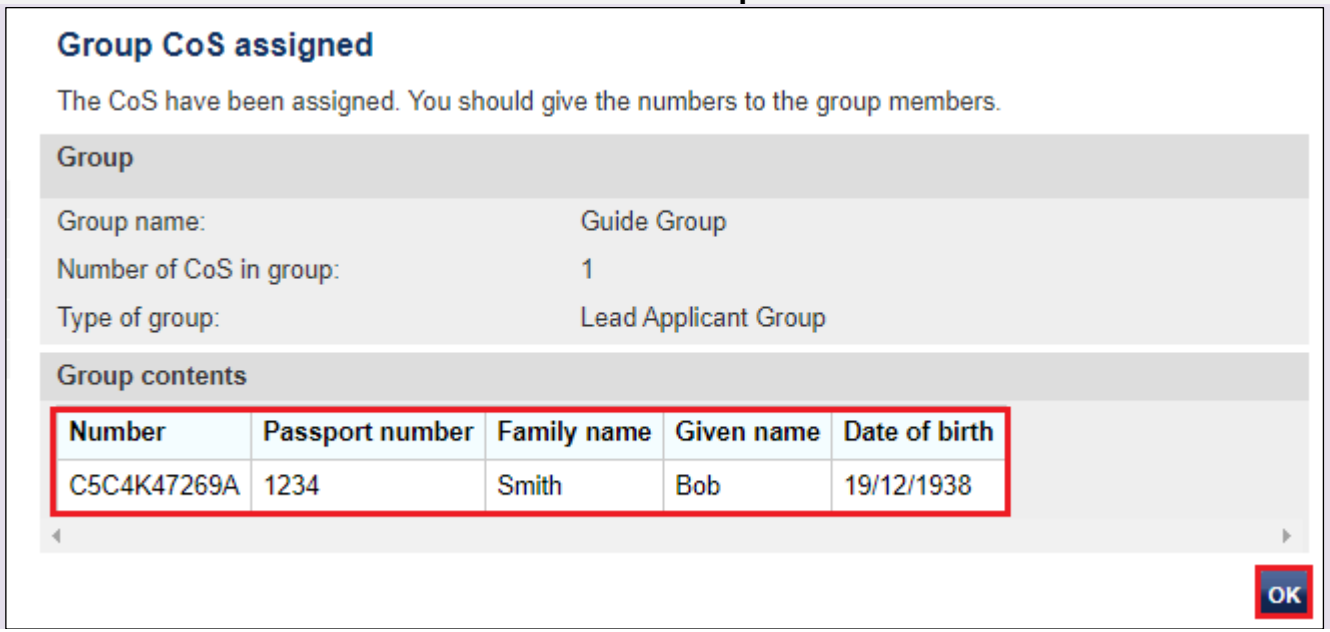
j. I understand you may ask for or check information from other law enforcement agencies, government departments, agencies, local authorities, the police, foreign governments and other bodies for immigration, research or security purposes or to help you process this application or monitor my ongoing 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 group

Step	Instructions	Screen example
9	If a fee is charged, the **Online payment** screen is displayed. Select **OK** to proceed with the transaction. This will open a third party payment service (Worldpay). If no fee is charged the **Group CoS assigned** screen is displayed. See below.	 **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. 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** Group name: Newer Group Number of CoS in group: 1 Amount: 21.00 Cancel OK

Step	Instructions	Screen example
10	From the **Group CoS assigned** screen, you can see that the group has been assigned and each CoS has been given a unique CoS number.	

Group CoS assigned

The CoS have been assigned. You should give the numbers to the group members.

Group

Group name:	Guide Group
Number of CoS in group:	1
Type of group:	Lead Applicant Group

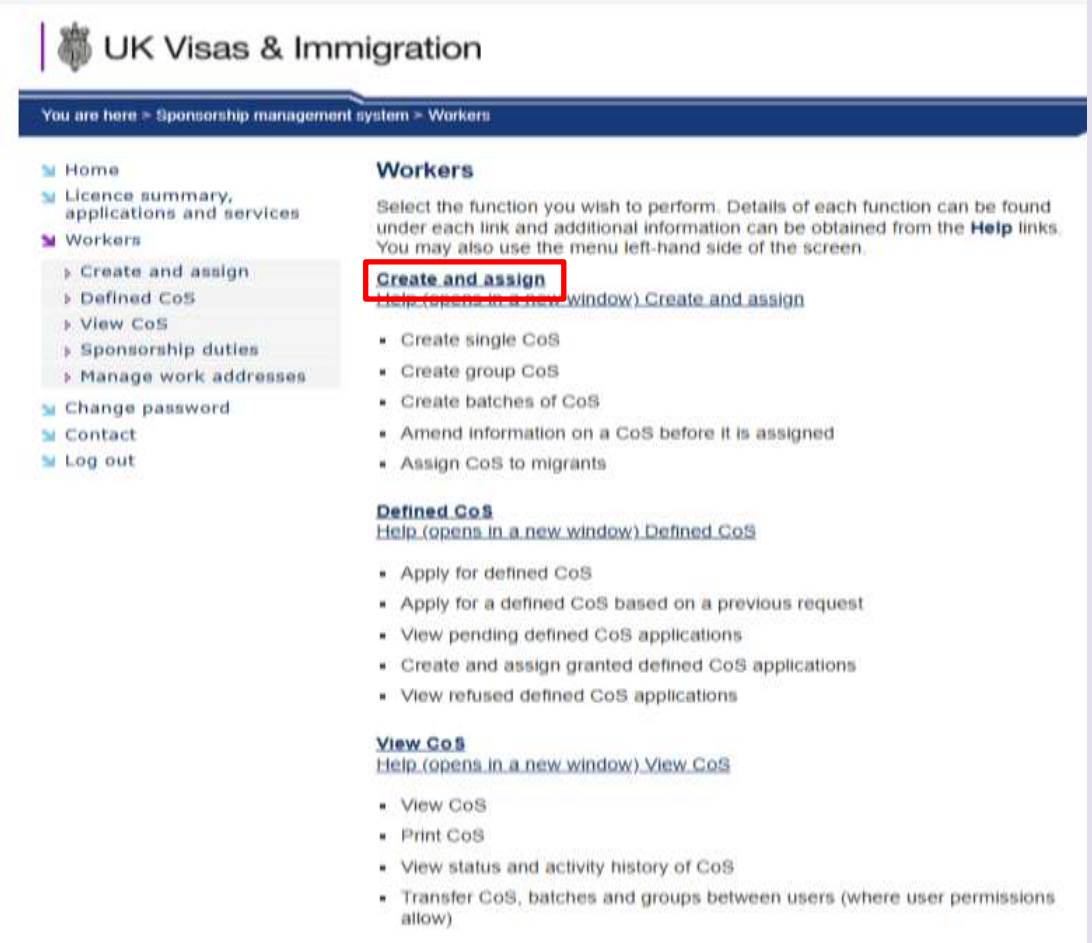
Group contents

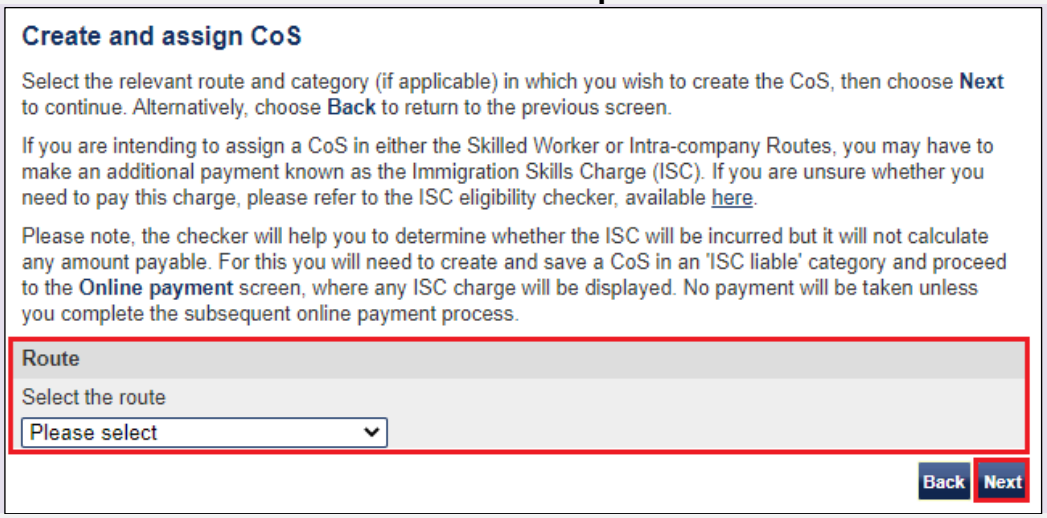
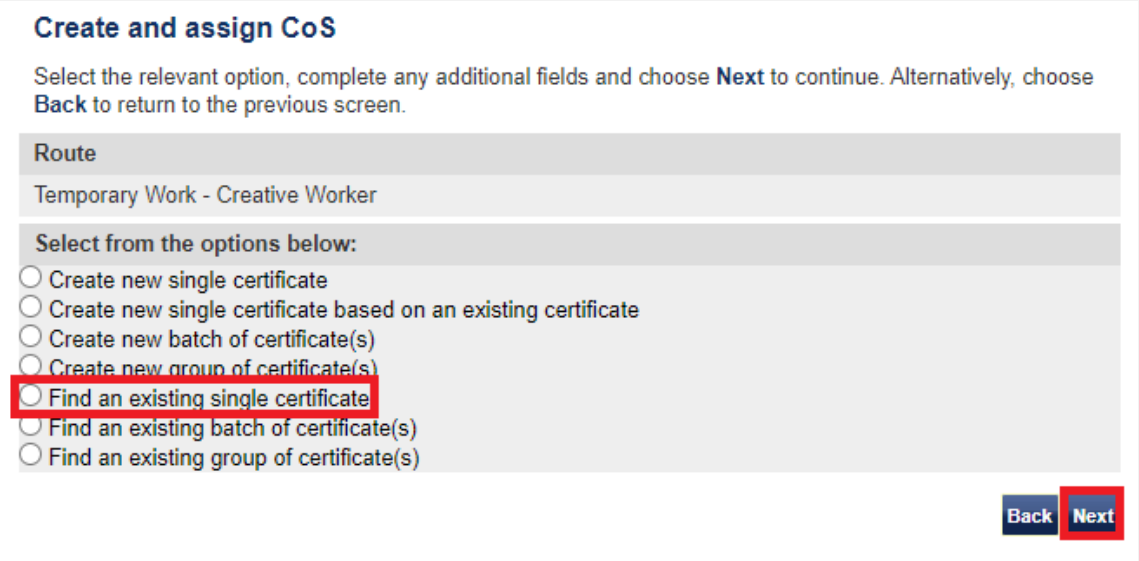
Number	Passport number	Family name	Given name	Date of birth
C5C4K47269A	1234	Smith	Bob	19/12/1938

OK

Guide 2: How to link and unlink an individual CoS to or from a group

Follow the step by step instructions below to link or unlink a single Tier 5 CoS to or from a group. This function is useful if you have previously created a CoS as part of a group but the individual would now enter or remain in the UK in their own right, or vice versa.

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

Step	Instruction	Screen example
2	From the **Create and assign CoS** screen, use the **Select the route** drop-down menu to select **Temporary Work – Creative Worker**, then select **Next**.	
3	From the **Create and assign CoS** screen, select **Find an existing single certificate**, 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

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.

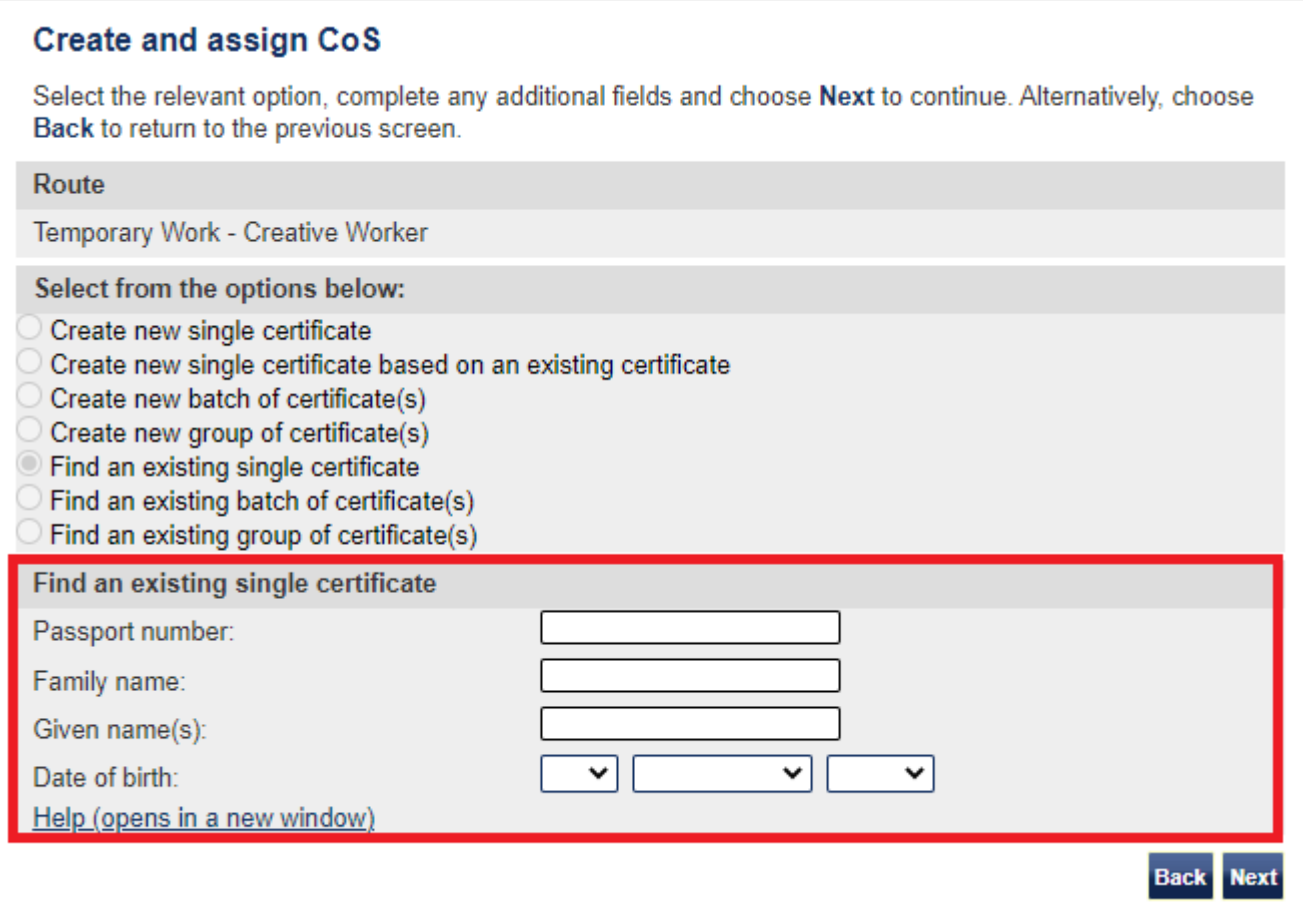
Route

Temporary Work - Creative Worker

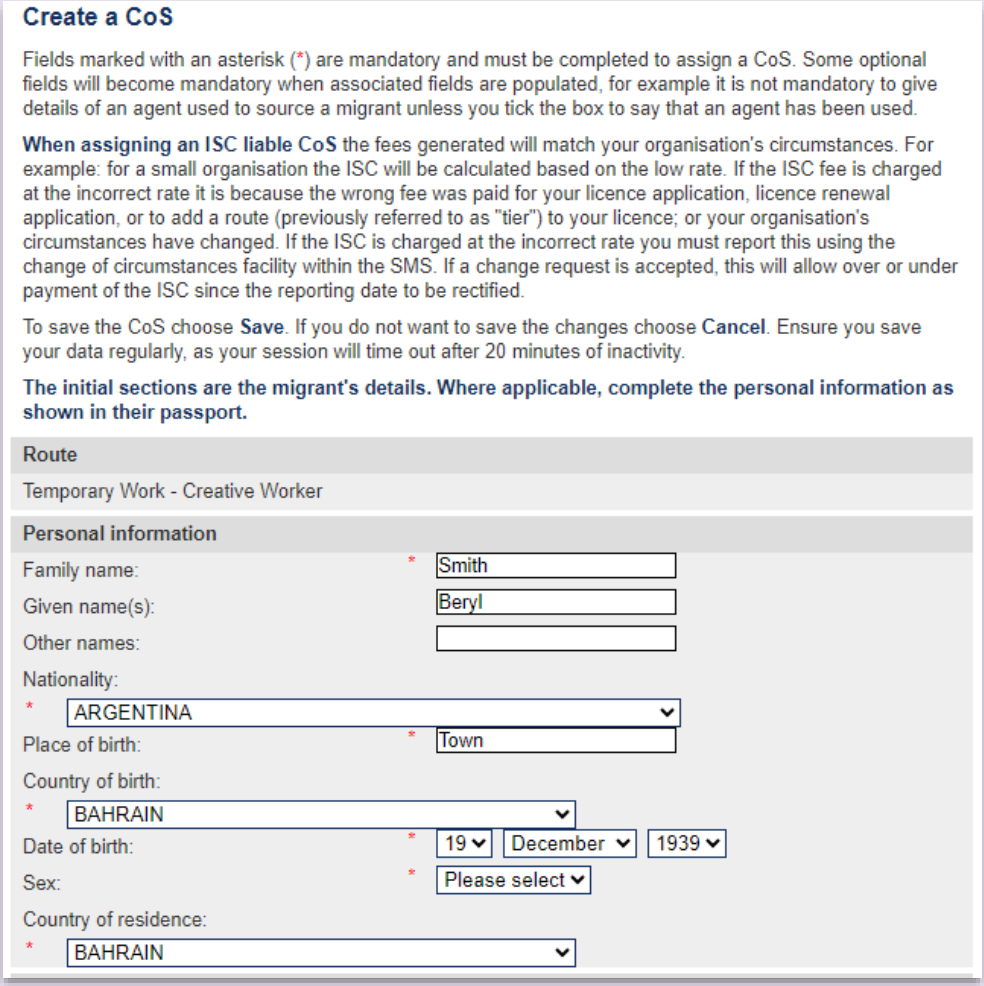
Select from the options below:

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

Back Next

Step	Instruction	Screen example
4	From the final **Create and assign CoS** screen, enter the details of the CoS you wish to link to a group, 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 link or unlink. If your search parameters are specific, you will be presented with the screen below.

Step	Instruction	Screen example
5	From the **Amend a CoS** screen, ensure you have identified the correct CoS, then select **Save**. If it is not the CoS you want to link to a group select **Cancel** and perform another search.	

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.

When assigning an ISC liable CoS the fees generated will match your organisation's circumstances. For example: for a small organisation the ISC will be calculated based on the low rate. If the ISC fee is charged at the incorrect rate it is because the wrong fee was paid for your licence application, licence renewal application, or to add a route (previously referred to as "tier") to your licence; or your organisation's circumstances have changed. If the ISC is charged at the incorrect rate you must report this using the change of circumstances facility within the SMS. If a change request is accepted, this will allow over or under payment of the ISC since the reporting date to be rectified.

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

Temporary Work - Creative Worker

Personal information

Family name: * Smith

Given name(s): Beryl

Other names:

Nationality: * ARGENTINA

Place of birth: * Town

Country of birth: * BAHRAIN

Date of birth: * 19 December 1939

Sex: * Please select

Country of residence: * BAHRAIN

Step	Instruction	Screen example
6	From the **Confirmation of saved CoS** screen, select **Link to group**.	

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
Temporary Work - Creative Worker

CoS summary	
Passport number:	123456789
Family name:	Smith
Given name(s):	Betty
Nationality:	ALAND ISLANDS
Date of birth:	03/07/1934
Sex:	Female
Work start date	19 June 2024
Work end date	06 May 2025

Assign

Link | Link to group

Exit | Amend

Step	Instruction	Screen example
7	From the **Link single CoS to group** screen, enter the name of the group to which you wish to link the CoS in the text box, then select **Next**.	

Link single CoS to group

Enter the name of the group to which you want to link the CoS and choose **Next**, or choose **Cancel** to return to the previous screen.

Route

Temporary Work - Creative Worker

CoS summary

Passport number:	123456789
Family name:	Smith
Given name(s):	Betty
Nationality:	ALAND ISLANDS
Date of birth:	03/07/1934
Sex:	Female
Work start date	19 June 2024
Work end date	06 May 2025

Link to group

Group name:

Help (opens in a new window)

Next

Cancel

Step	Instruction	Screen example
8	From the **Link CoS to a group** screen, ensure you have identified the correct group, then select **Link to group**.	

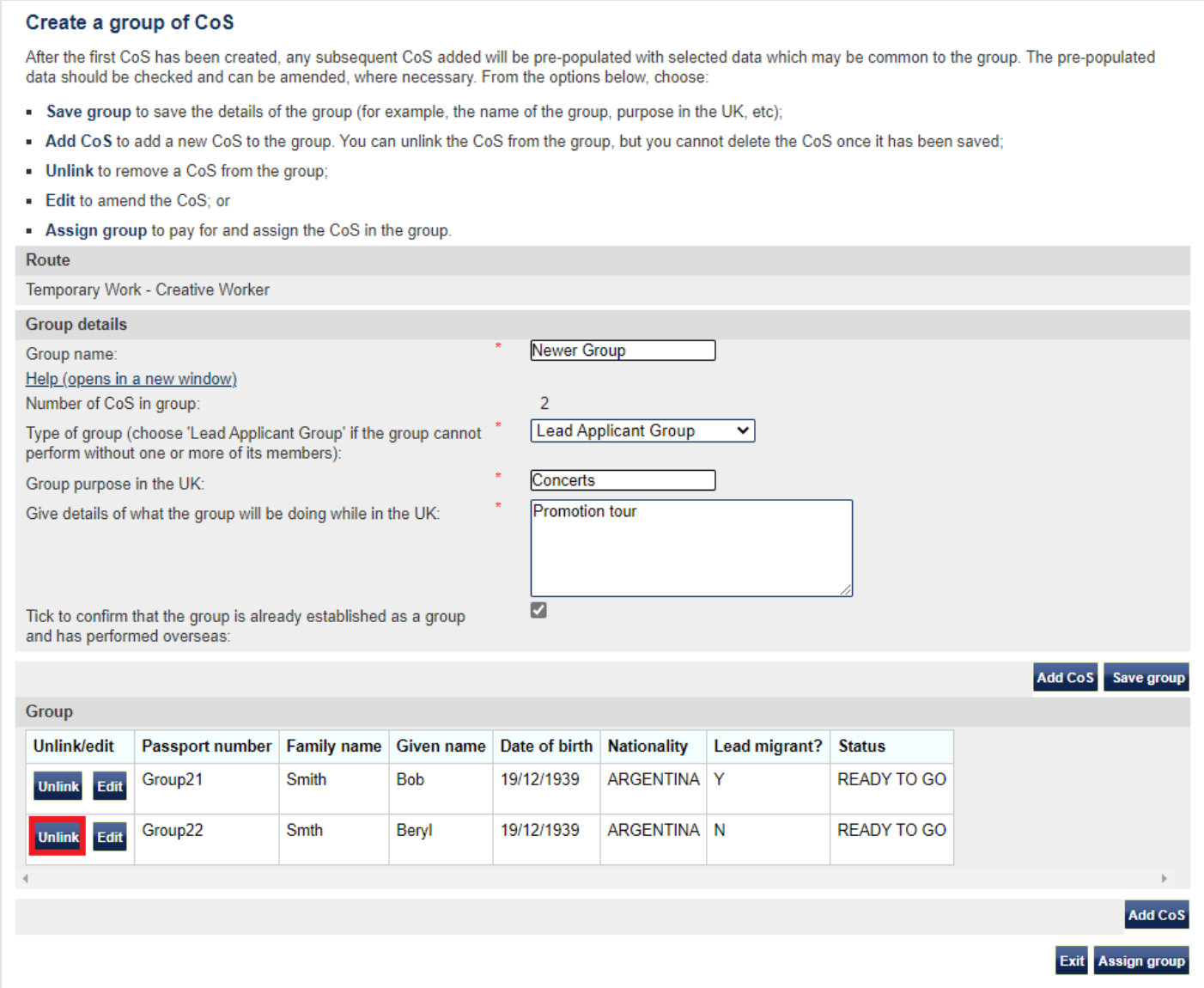
Link CoS to a group

Choose **Link to group** to confirm you want to link the CoS to this group. Choose **Cancel** if you do not want to continue.

Route	
Temporary Work - Creative Worker	
Group	
Group name:	New group
CoS summary	
Passport number:	123456789
Family name:	Smith
Given name(s):	Betty
Nationality:	ALAND ISLANDS
Date of birth:	03/07/1934
Sex:	Female
Work start date	19 June 2024
Work end date	06 May 2025

Cancel | Link to group

Step	Instruction	Screen example
9	The CoS has been linked to the group. *To unlink a CoS:* From the **Create a group of CoS** screen select **Unlink** next to the CoS you wish to unlink.	



Step	Instruction	Screen example
10	From the **Unlink CoS from group** screen, confirm that you have identified the correct CoS, then select **Unlink CoS**. If you have selected the wrong CoS, select **Cancel** to return to the previous screen.	

Unlink CoS from group

Choose **Unlink** to remove a CoS from a group. The CoS becomes a single CoS.

Route	
Temporary Work - Creative Worker	
Group summary	
Group name:	New group
CoS summary	
Passport number:	123456789
Family name:	Smith
Given name(s):	Betty
Nationality:	ALAND ISLANDS
Date of birth:	03/07/1934
Sex:	Female

Cancel Unlink CoS

Step	Instruction	Screen example
11	The CoS has been unlinked from the group.	

Create a group of CoS

After the first CoS has been created, any subsequent CoS added will be pre-populated with selected data which may be common to the group. The pre-populated data should be checked and can be amended, where necessary. From the options below, choose:

- **Save group** to save the details of the group (for example, the name of the group, purpose in the UK, etc);
- **Add CoS** to add a new CoS to the group. You can unlink the CoS from the group, but you cannot delete the CoS once it has been saved;
- **Unlink** to remove a CoS from the group;
- **Edit** to amend the CoS; or
- **Assign group** to pay for and assign the CoS in the group.

Route

Temporary Work - Creative Worker

Group details

Group name: * Newer Group

Help (opens in a new window)

Number of CoS in group: 1

Type of group (choose 'Lead Applicant Group' if the group cannot perform without one or more of its members): * Lead Applicant Group

Group purpose in the UK: * Concerts

Give details of what the group will be doing while in the UK: * Promotion tour

Tick to confirm that the group is already established as a group and has performed overseas: ☑

Add CoS | Save group

Group

Unlink/edit	Passport number	Family name	Given name	Date of birth	Nationality	Lead migrant?	Status
Unlink Edit	Group21	Smith	Bob	19/12/1939	ARGENTINA	Y	READY TO GO

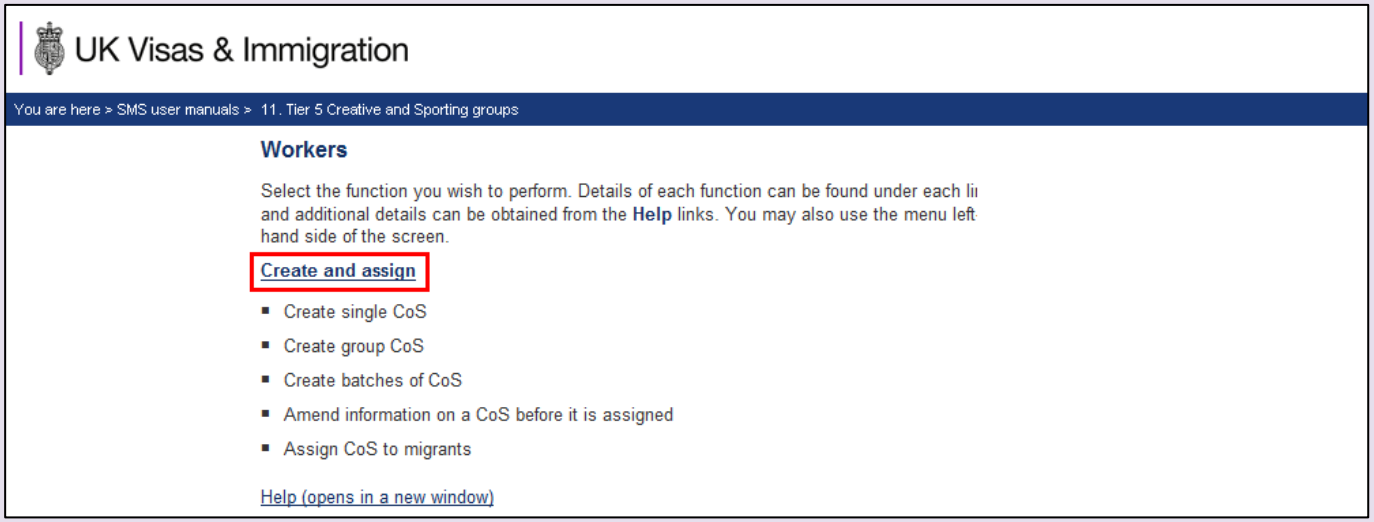
Add CoS

Exit | Assign group

Guide 3: How to find a group, add CoS and then assign the group

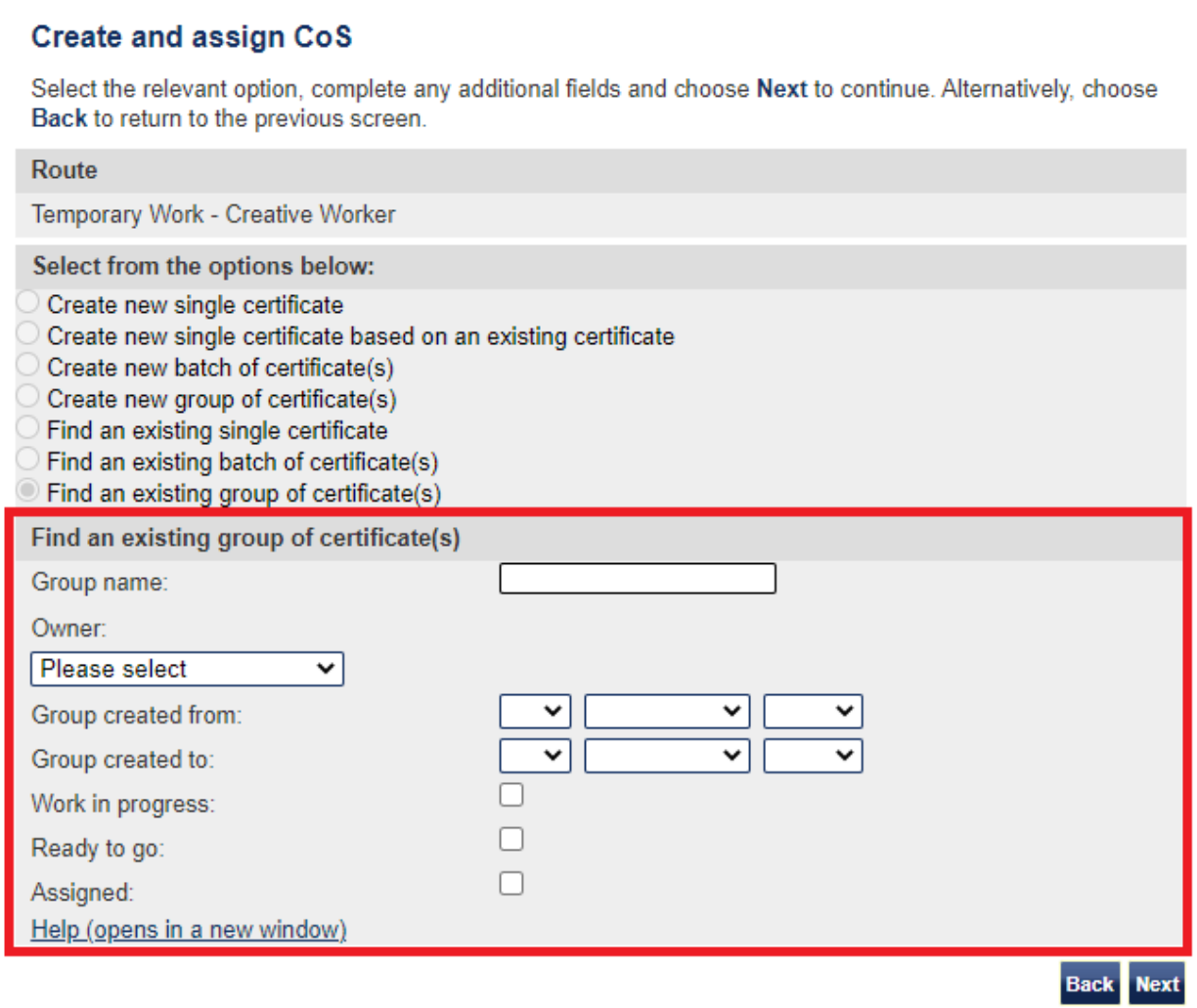
Follow the step by step instructions below to find an existing group of CoS, add further CoS and then assign the group.

You should read the Sponsorship policy guidance before preparing a group.

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

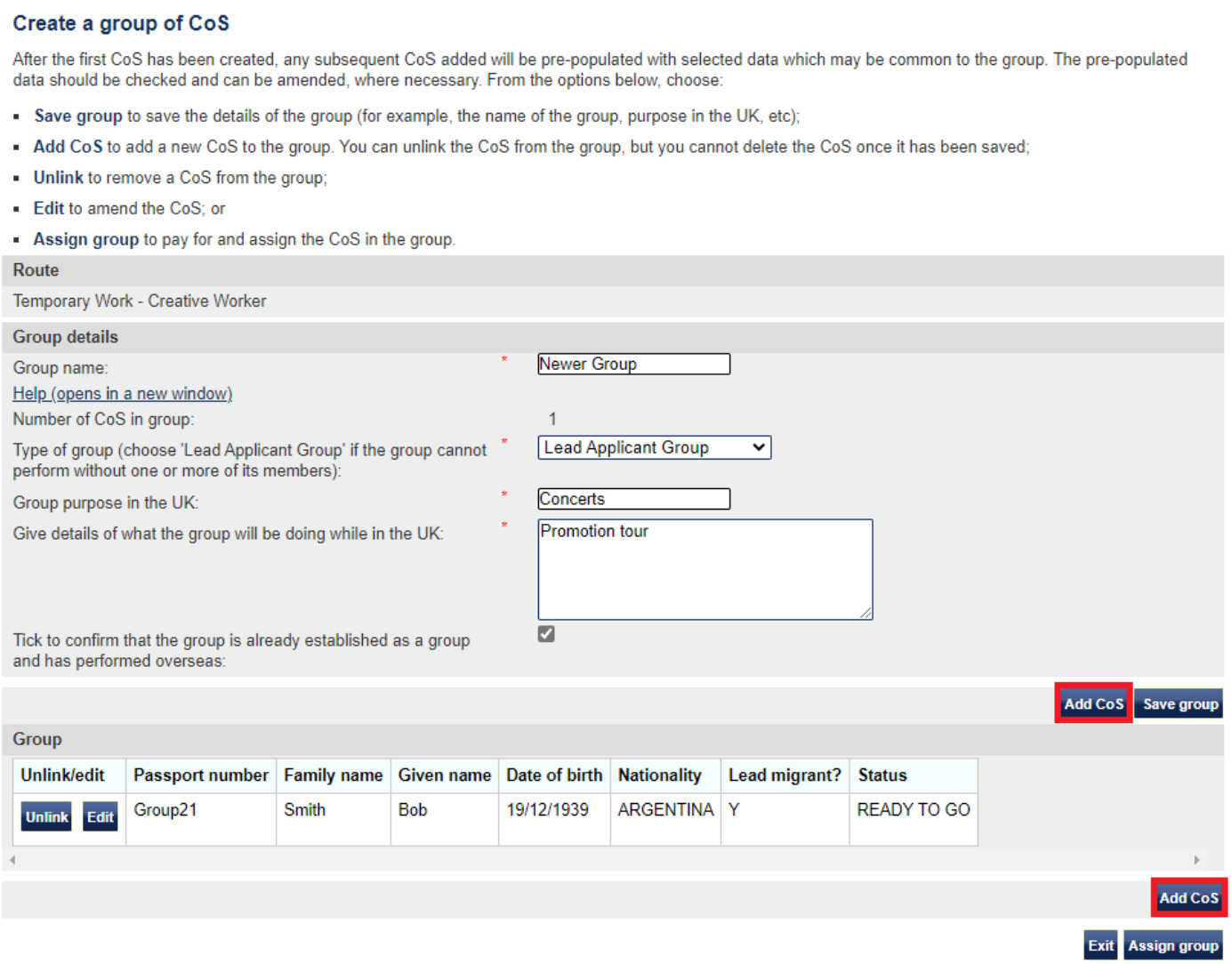
Step	Instruction	Screen example

Step	Instruction	Screen example
2	From the **Create and assign CoS** screen, use the **Select the route** drop-down menu to select **Temporary Work – Creative Worker**, 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 **Find an existing group of 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 Temporary Work - Creative Worker Select from the options below: ○ Create new single certificate ○ Create new single certificate based on an existing certificate ○ Create new batch of certificate(s) ○ Create new group of certificate(s) ○ Find an existing single certificate ○ Find an existing batch of certificate(s) ○ Find an existing group of certificate(s) Back Next

4	From the **Create and assign CoS** screen, enter the name of the group you wish to find in the **Group name** text box, then select **Next**.	

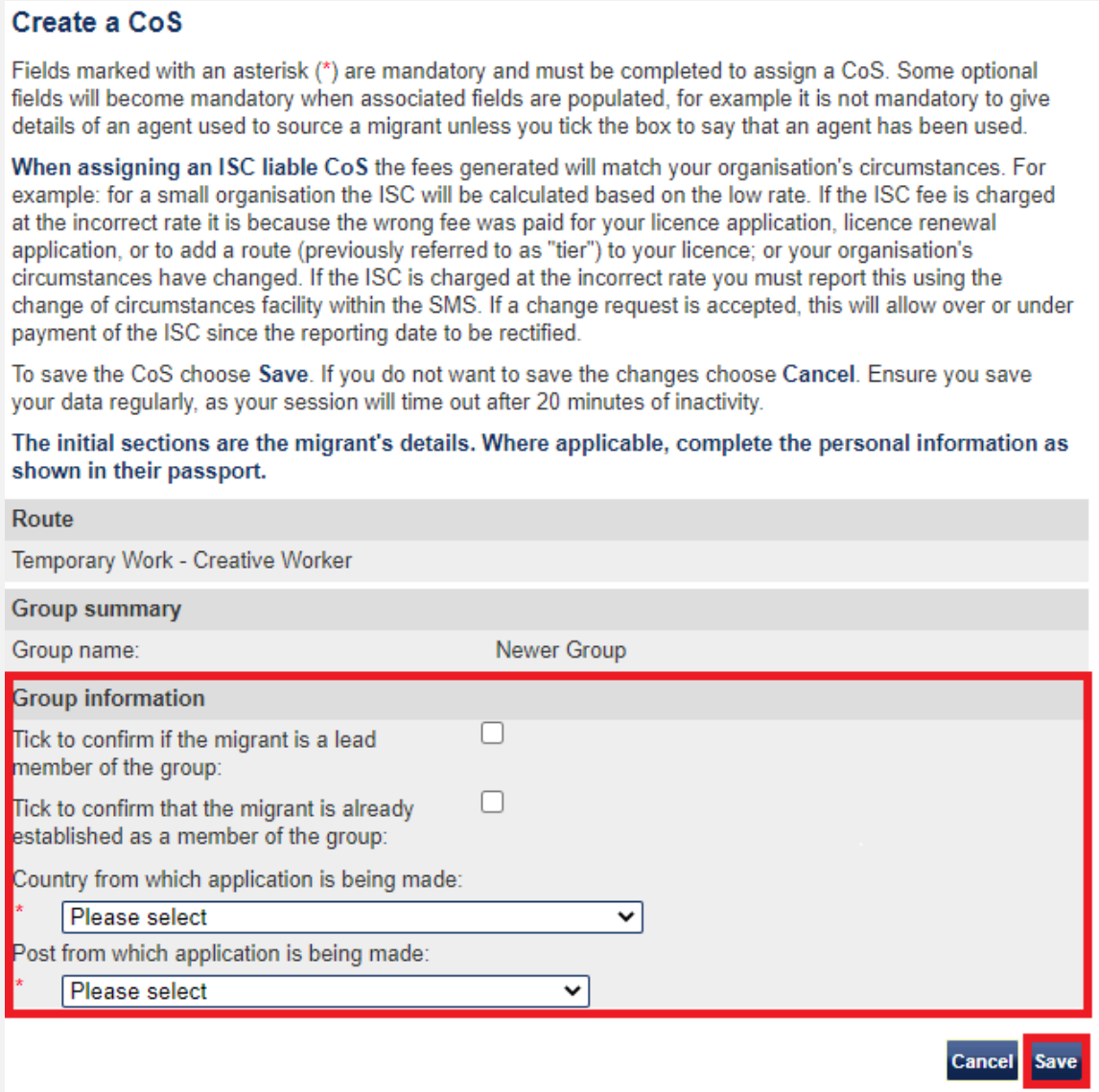
Note If your search parameters are not specific, you will be presented with a list of groups. This screen is not featured in this guide. Select the group you wish to retrieve. If your search parameters are specific, you will be presented with the screen on the next page.

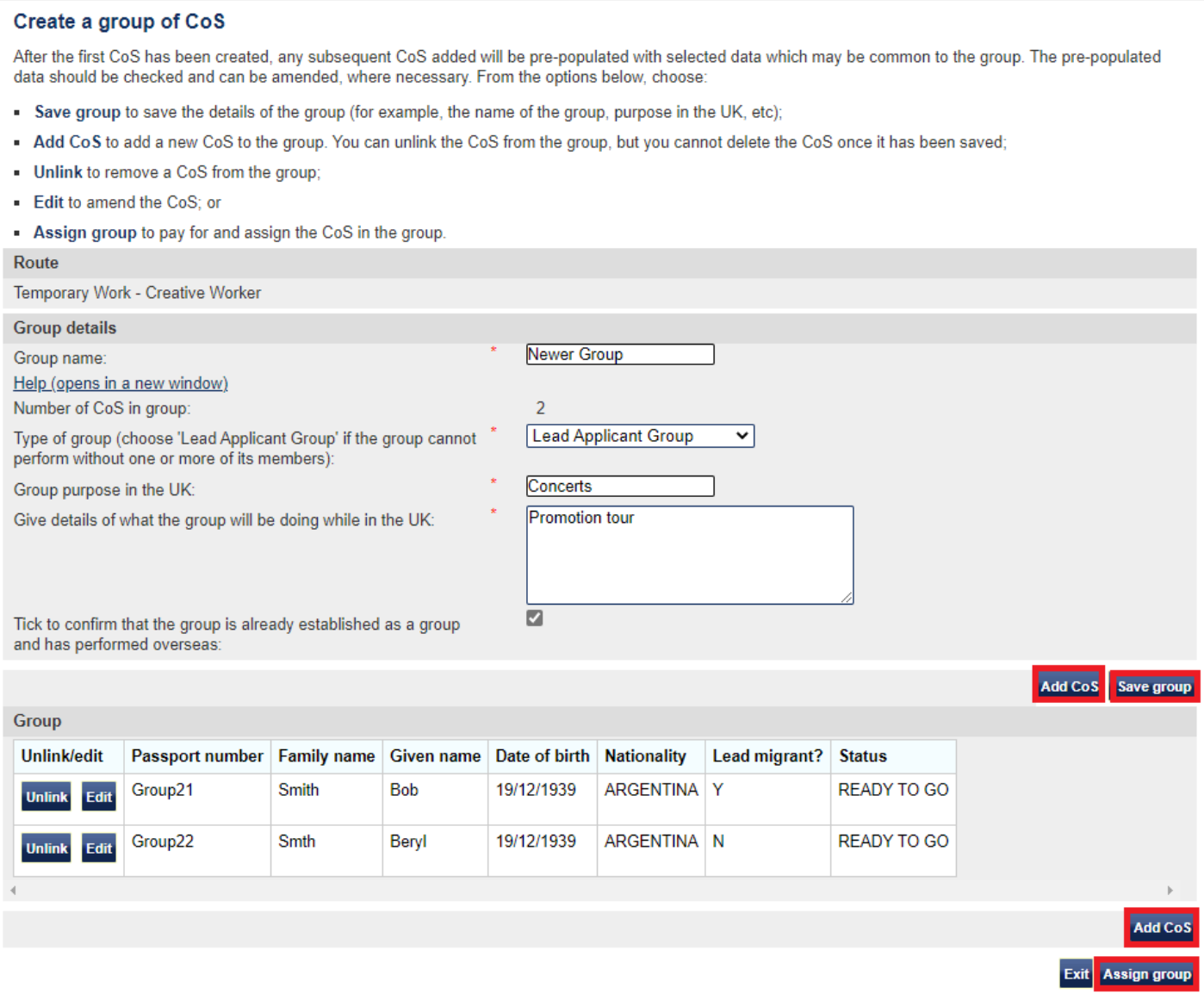
Step	Instruction	Screen example

5	*To add a CoS to the group* On the **Create a group of CoS** screen, select **Add CoS**.	 **Create a group of CoS** After the first CoS has been created, any subsequent CoS added will be pre-populated with selected data which may be common to the group. The pre-populated data should be checked and can be amended, where necessary. From the options below, choose: ▪ **Save group** to save the details of the group (for example, the name of the group, purpose in the UK, etc); ▪ **Add CoS** to add a new CoS to the group. You can unlink the CoS from the group, but you cannot delete the CoS once it has been saved; ▪ **Unlink** to remove a CoS from the group; ▪ **Edit** to amend the CoS; or ▪ **Assign group** to pay for and assign the CoS in the group. **Route** Temporary Work - Creative Worker **Group details** Group name: * Newer Group Help (opens in a new window) Number of CoS in group: 1 Type of group (choose 'Lead Applicant Group' if the group cannot perform without one or more of its members): * Lead Applicant Group Group purpose in the UK: * Concerts Give details of what the group will be doing while in the UK: * Promotion tour Tick to confirm that the group is already established as a group and has performed overseas: ☑ Add CoS Save group **Group** Unlink/edit | Passport number | Family name | Given name | Date of birth | Nationality | Lead migrant? | Status Unlink Edit | Group21 | Smith | Bob | 19/12/1939 | ARGENTINA | Y | READY TO GO Add CoS Exit Assign group

Note	The **Save group** button only needs to be selected when changes have been made to the group details (lead applicant, purpose etc). You do not need to save the group when adding a CoS.

Step	Instruction	Screen example

Step	Instruction	Screen example
6	From the **Create a CoS** screen, enter the details of the new member of the group. When all mandatory fields have been completed, select **Save**.	

Step	Instruction	Screen example
7	From the **Create a group of CoS** screen, the **Group** table now displays that the new person has been added to the group. • To add more CoS to the group, select **Add CoS** and repeat the steps above. • Select **Save group** to save the group without assigning. • To assign and pay for the group, select **Assign group**.	

Step	Instruction	Screen example
8	From the **Confirm group before assigning** screen, select **Assign group**.	**Confirm group before assigning** Check the information and choose **Assign group** to assign the CoS in the group. **CoS allocation** Please review the number of CoS used and your allocation limit for this allocation year. Route: Temporary Work - Creative Worker Limit: 100 Unused: 99 **Group** Group name: Newer Group Number of CoS in group: 2 Type of group: Lead Applicant Group I agree to the terms and conditions: ☐ Back Assign group
9	The **Online payment** screen is now displayed. Select **OK** to proceed with the transaction. This will open our contracted 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. 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** Group name: Newer Group Number of CoS in group: 2 Amount: 21.00 Cancel OK

10 From the **Group CoS assigned** screen, you can see that group has been assigned and each CoS has been given a unique reference number.

Group CoS assigned

The CoS have been assigned. You should give the numbers to the group members.

Group

Group name:	Newer Group
Number of CoS in group:	2
Type of group:	Lead Applicant Group

Group contents

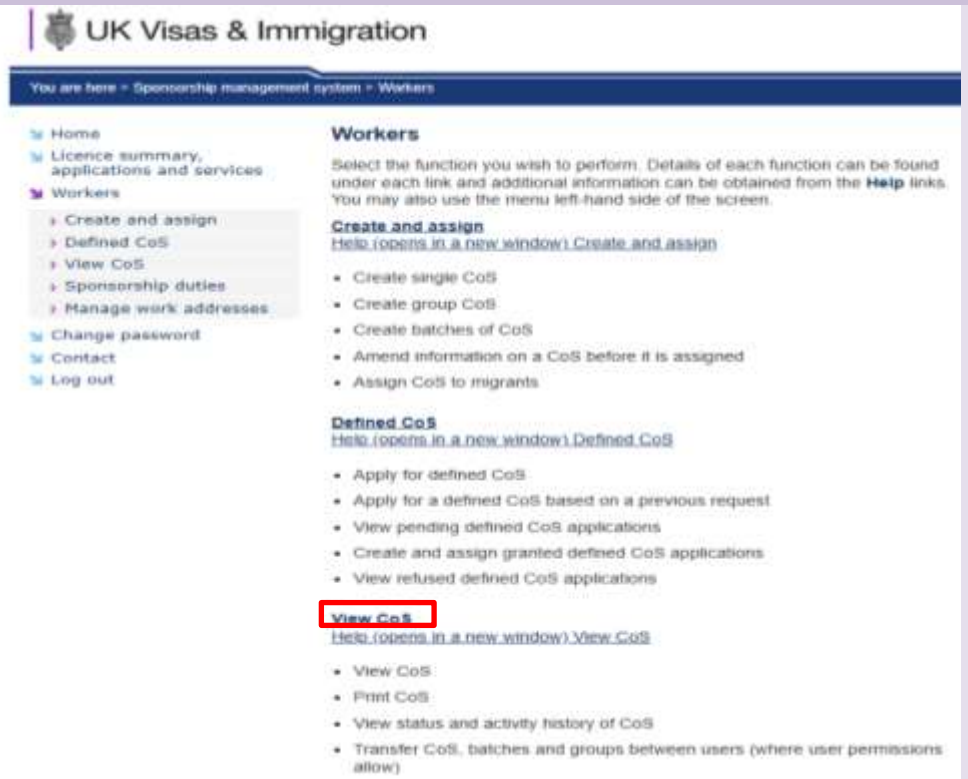
Number	Passport number	Family name	Given name	Date of birth
C5C5R47579A	Group21	Smith	Bob	19/12/1939
C5C5R57579A	Group22	Smth	Beryl	19/12/1939

OK

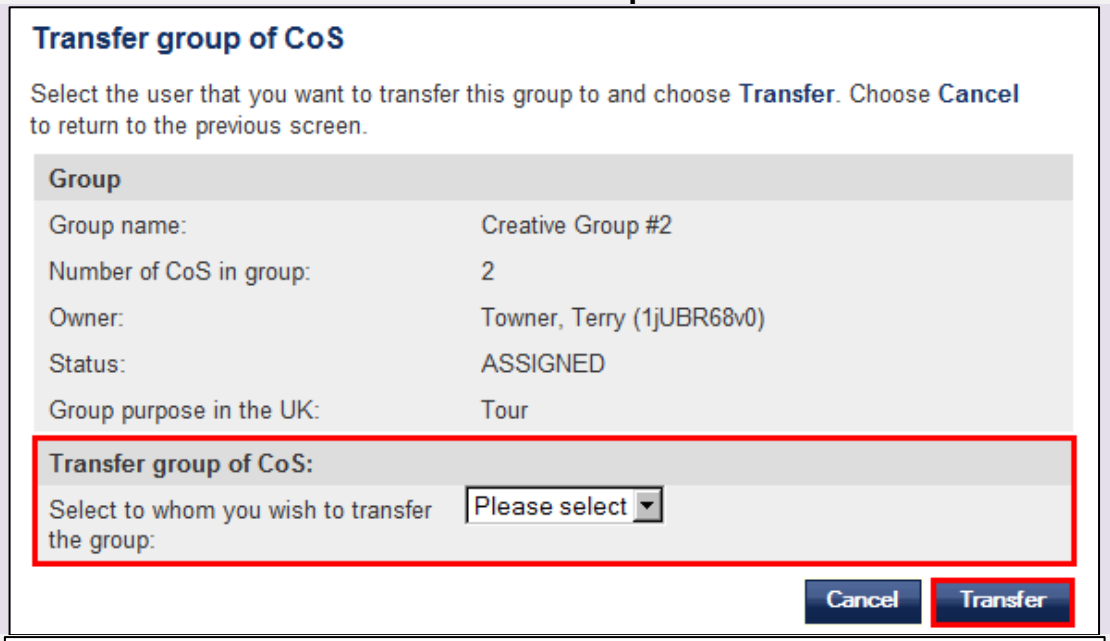
Guide 4: How to transfer a group of CoS to another SMS user

Follow the step by step instructions below to transfer ownership of a group to another SMS user. This function is useful if a user is no longer in a role that requires them to use SMS, or if a second SMS user is taking ownership of another SMS user's workload.

You should read the SMS guide 8a – Creating a CoS – guide for business sponsors and Sponsorship policy guidance before transferring ownership of a group.

Step	Instruction	Screen example
1	From the **Workers** screen, select **View CoS**.	

Step	Instruction	Screen example
2	From the **View CoS** screen, select **Transfer group of CoS**.	**View CoS** Choose an option below to find an individual, batch or group of CoS or choose **Transfer group of CoS** to transfer a group to another user (only Level 1 users can transfer CoS). **Please note**, Level 2 users can only view CoS that they own. Search for CoS ▪ Find a CoS using migrant details ▪ Conduct an advanced search for CoS using a range of parameters Help (opens in a new window) Search for batch(es) of CoS ▪ Find a batch of CoS using batch details Help (opens in a new window) Search for groups of CoS ▪ Find a group of CoS using group details Help (opens in a new window) Transfer group of CoS ▪ Transfer a group of CoS to a different user Help (opens in a new window)
3	From the **Transfer group of CoS** screen, enter the name of the group, then select **Next**.	**Transfer group of CoS** Enter the name of the group that you want to transfer and choose **Next**. You must enter the group name exactly. Choose **Back** to return to the View CoS menu. Group Group name: Back Next
Note	The text entered must match the group name precisely, including any spaces, although the search is not case sensitive.	

Step	Instruction	Screen example
4	From the **Transfer group of CoS** screen, select the user to whom you wish to transfer the group from the **Select user to transfer group to** drop-down menu, then select **Transfer**.	
5	The group has been transferred. Select **OK** to return to the **View CoS** screen.	