UK Visas
& Immigration

The sponsorship management system (SMS) manuals

Step by step guide for sponsors

Manual 9 of 12: Reporting worker activity

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Additional SMS manuals

There are 12 SMS manuals available, plus a supplementary policy guide for completing a CAS. The manuals are grouped into three categories: common, CAS and CoS. The table below describes the purpose and audience of each manual.

You should read all manuals applicable to your licence before contacting the relevant helpdesk.

Manual reference	Manual title	Type	Purpose	Audience
Manual 1	Introduction to SMS & 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 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

Manual reference	Manual title	Type	Purpose	Audience
Manual 8	Creating and assigning CoS	CoS	To help sponsors create and assign individual and batches of CoS.	Sponsors licensed in any Worker or Temporary Worker route
Manual 9	Reporting worker activity	CoS	To help sponsors report worker activity, for example if a worker's circumstances change. This manual also contains help with adding sponsor notes to CoS that have already been assigned.	Sponsors licensed in any Worker or Temporary Worker route
Manual 10	Miscellaneous CoS functions	CoS	To help sponsors complete all other functions of CoS, such as managing batches of CoS, managing pre-stored addresses for use when creating CoS, transferring ownership of CoS, and printing CoS.	Sponsors licensed in any Worker or Temporary Worker route

Manual reference	Manual title	Type	Purpose	Audience
Manual 11	Tier 5 Creative and Sporting groups of CoS	CoS	To help sponsors create and manage groups of CoS. Groups of CoS are only available to sponsors licensed in Tier 5 (Creative and Sporting).	Sponsors licensed in the Temporary Worker - Creative and Sporting route
Manual 12	Defined CoS	CoS	To help sponsors apply for defined CoS, track applications for defined CoS and once granted, create defined CoS.	Sponsored licensed in Skilled Worker
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 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.

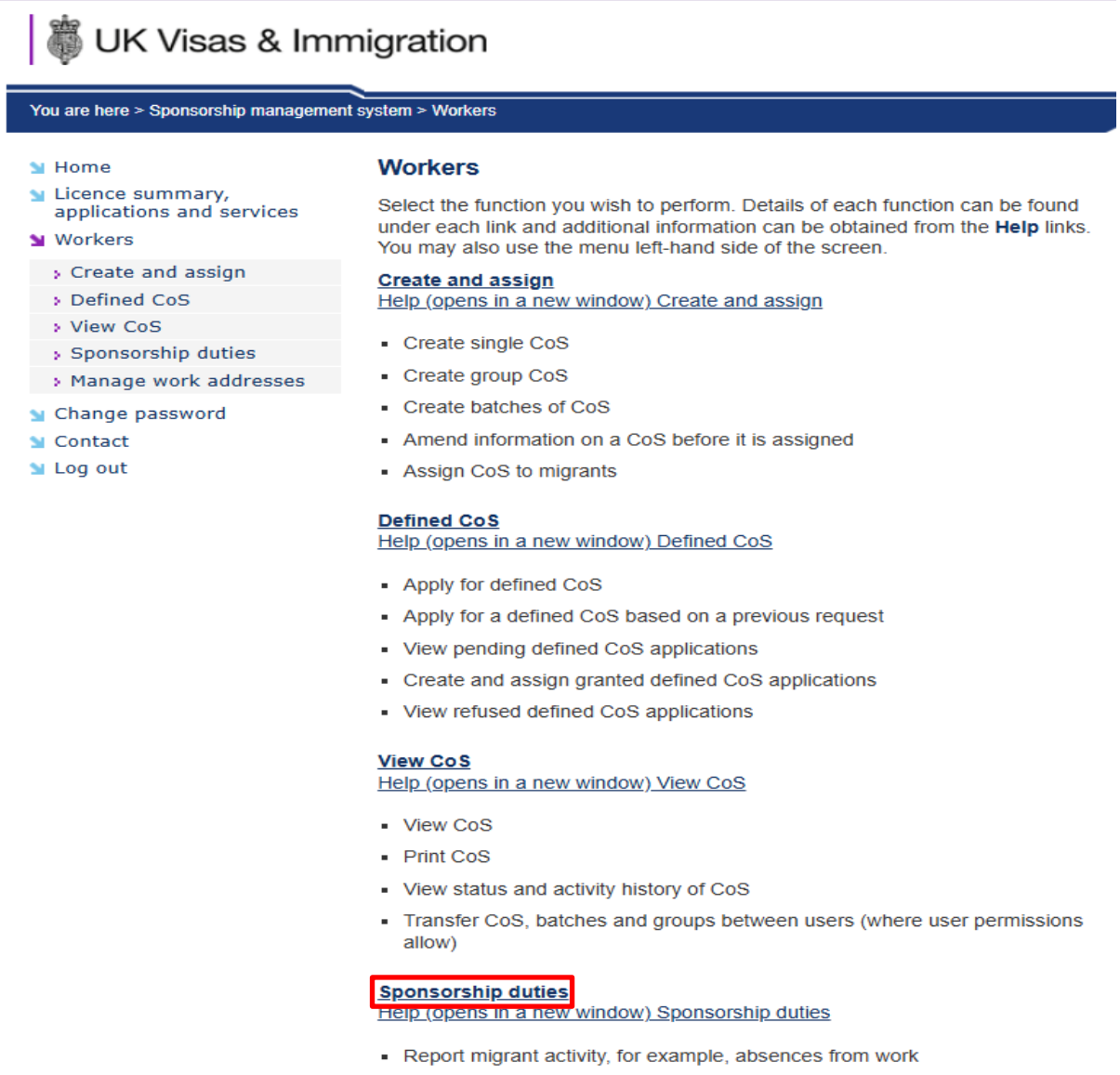
SMS guides

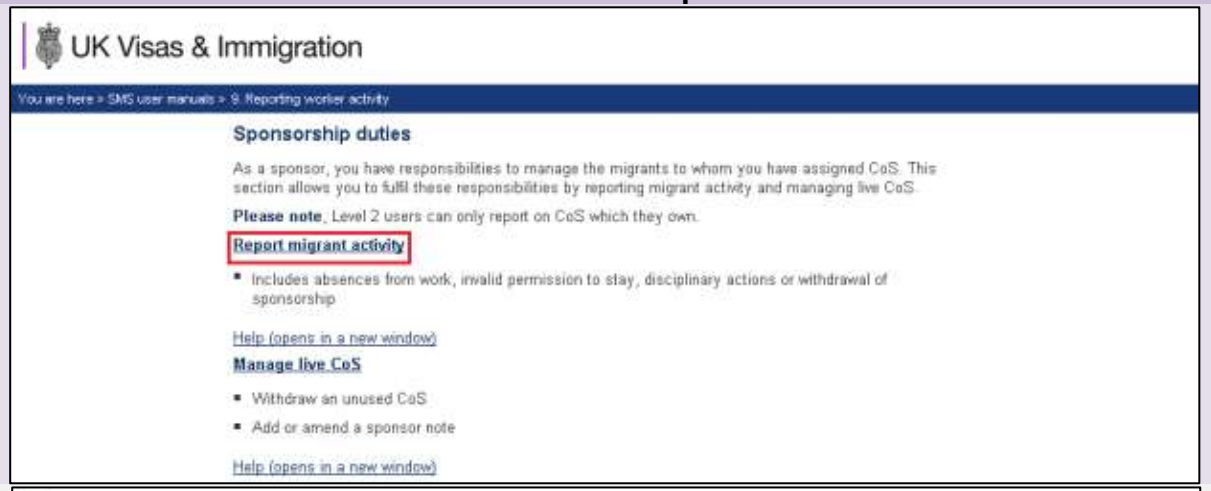
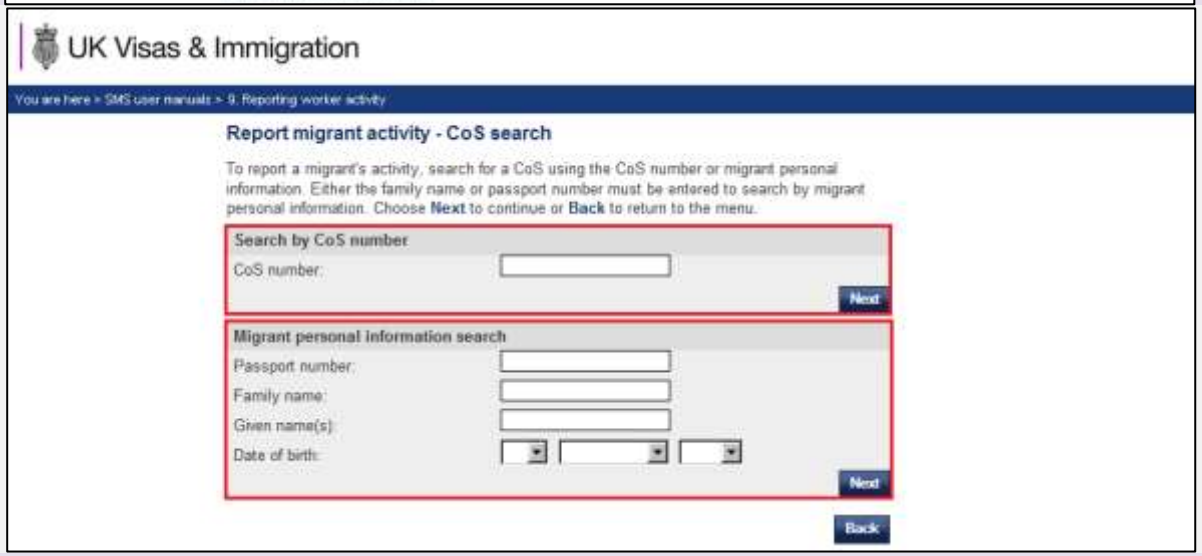
Guide 1: How to report individual migrant activity

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

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

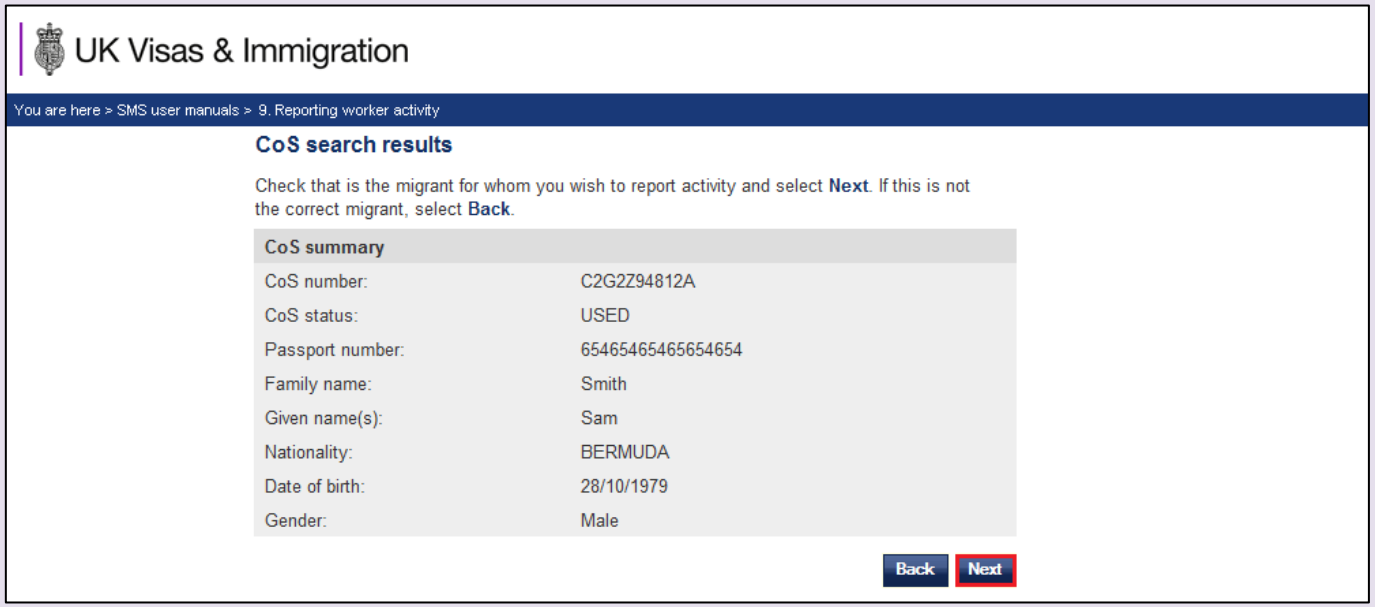
You should read the Sponsorship policy guidance before reporting migrant activity.

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

Step	Instruction	Screen example
2	From the **Sponsorship duties** screen, select **Report migrant activity**.	
3	From the **Report migrant activity – CoS search** screen, enter your search parameters, then select **Next**.	

Note

- If your search parameters are not specific, you will be presented with a long list of CoS. Select the CoS on which you wish to report.
- You can only report against a CoS that has been used in a migrant's application for leave to enter, leave to remain or worker authorisation.

Step	Instruction	Screen example
4	From the **CoS search results** screen, check that you have identified the correct CoS. If not, select **Back**. If it is the correct CoS, select **Next**.	

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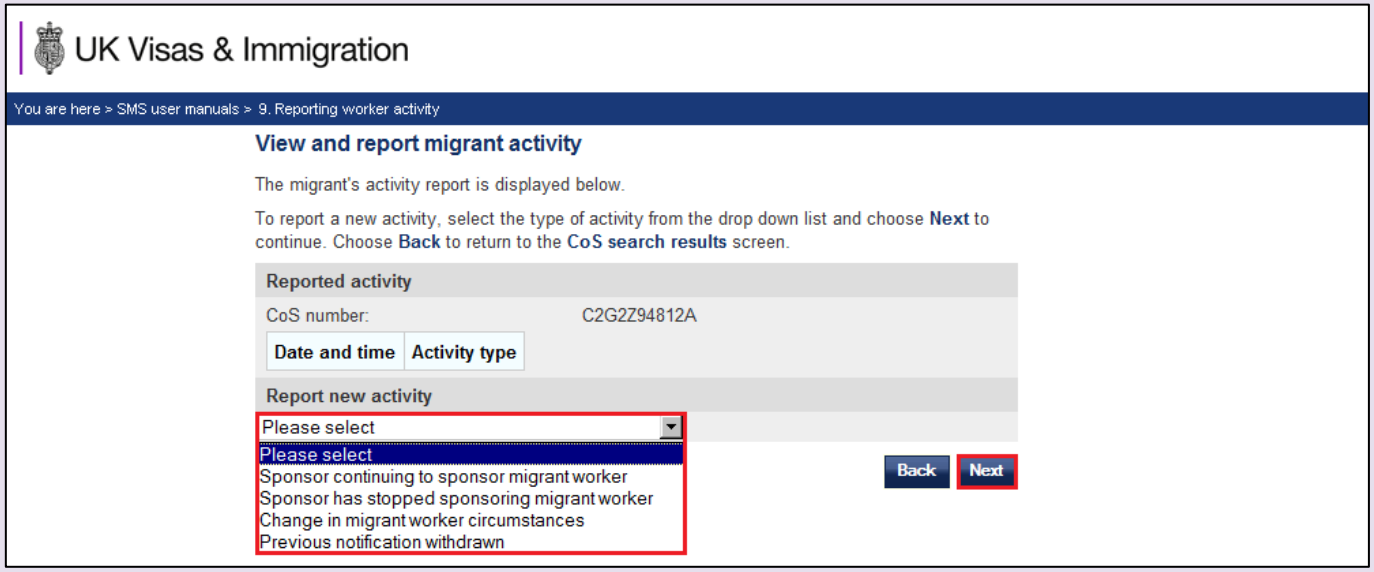
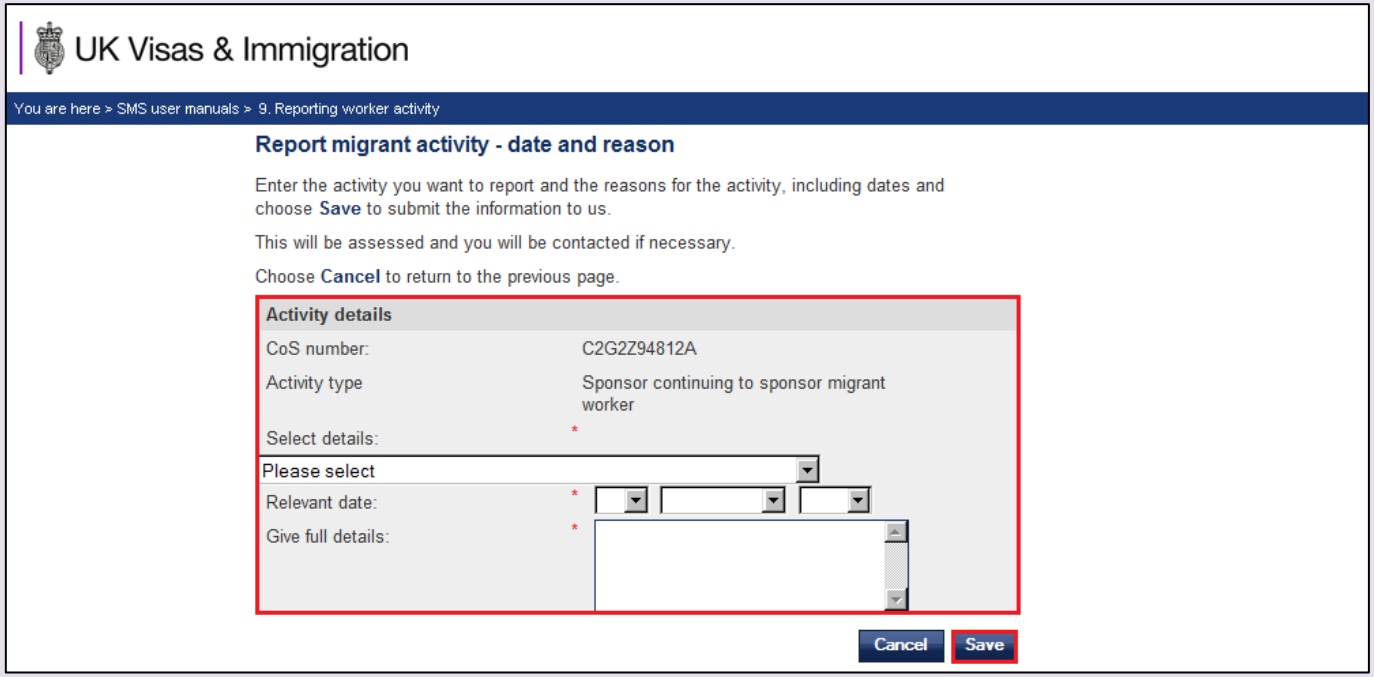
CoS search results

Check that is the migrant for whom you wish to report activity and select **Next**. If this is not the correct migrant, select **Back**.

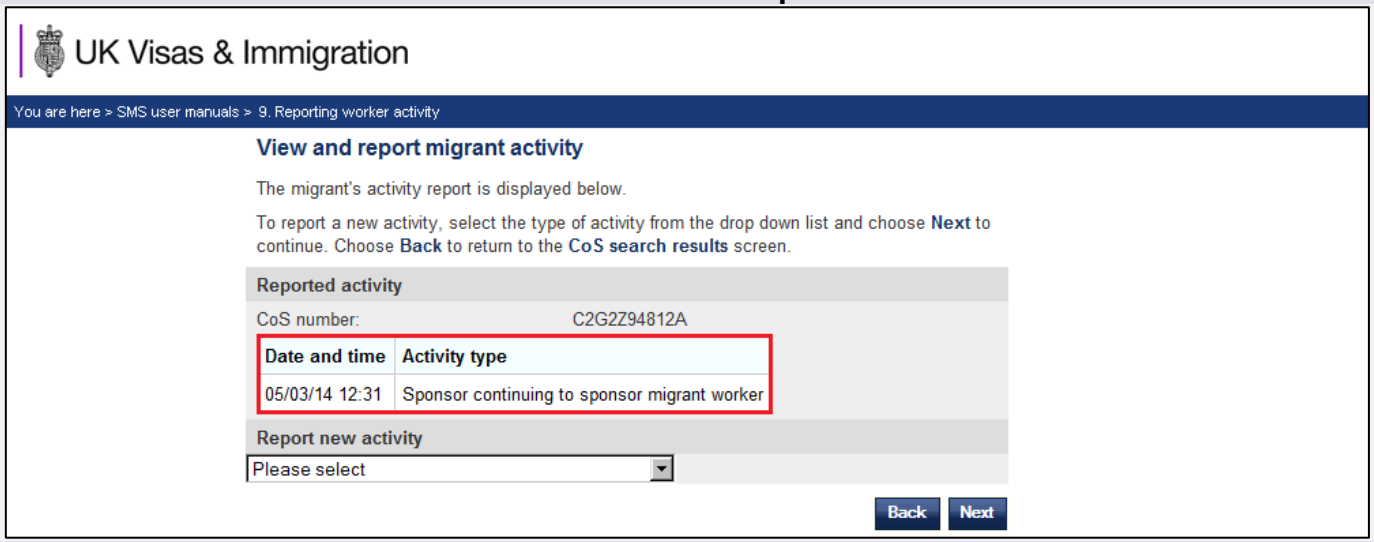
CoS summary	
CoS number:	C2G2Z94812A
CoS status:	USED
Passport number:	65465465465654654
Family name:	Smith
Given name(s):	Sam
Nationality:	BERMUDA
Date of birth:	28/10/1979
Gender:	Male

Back Next

Step	Instruction	Screen example
5	From the **Report new activity** drop-down menu, choose the appropriate reason, then select **Next**. You can also view previously reported activity on this screen, under the **Reported activity** heading.	

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

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

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

Guide 2: How to add and amend sponsor notes

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

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

You should read the Sponsorship policy guidance before adding a sponsor note to a live CoS.

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

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- Home
- Licence summary, applications and services
- Workers
  - Create and assign
  - Defined CoS
  - View CoS
  - Sponsorship duties
  - Manage work addresses
- Change password
- Contact
- Log out

Workers

Select the function you wish to perform. Details of each function can be found under each link and additional information can be obtained from the **Help** links. You may also use the menu left-hand side of the screen.

Create and assign
Help (opens in a new window) Create and assign

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

Defined CoS
Help (opens in a new window) Defined CoS

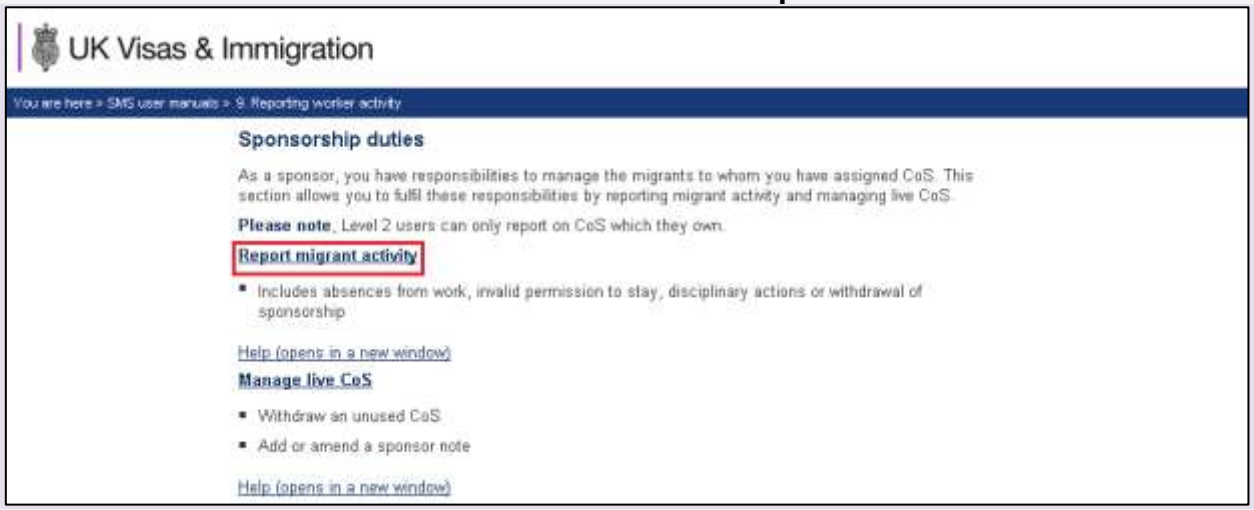
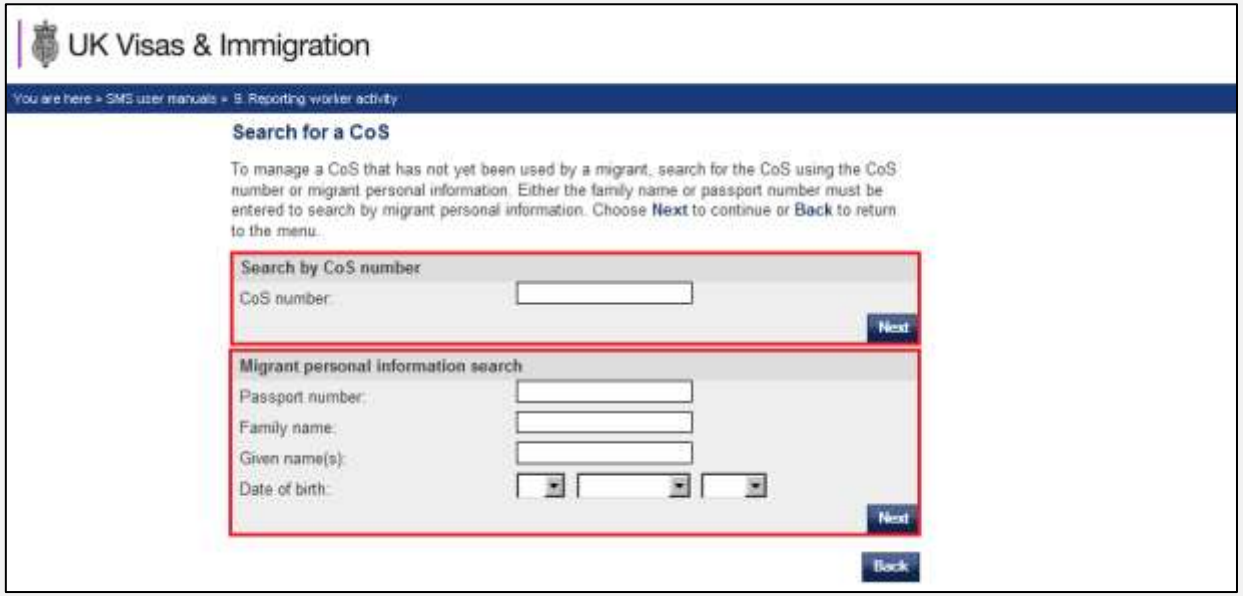
- Apply for defined CoS
- Apply for a defined CoS based on a previous request
- View pending defined CoS applications
- Create and assign granted defined CoS applications
- View refused defined CoS applications

View CoS
Help (opens in a new window) View CoS

- View CoS
- Print CoS
- View status and activity history of CoS
- Transfer CoS, batches and groups between users (where user permissions allow)

Sponsorship duties
Help (opens in a new window) Sponsorship duties

- Report migrant activity, for example, absences from work

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

Step	Instruction	Screen example
4	From the **Manage live CoS** screen, check that you have identified the correct CoS. If not, select **Back**. If it is the correct CoS, select **Sponsor note**.	

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Manage live CoS

Manage the live CoS using the buttons below, choose:

- **Sponsor note** to add a note to a CoS, for example to inform us of a spelling mistake in a name or a change to a passport number.
- **Withdraw CoS** to withdraw the CoS before it has been used by the migrant in an application for leave to enter/remain. This option is only available for CoS with a status of **Assigned**.
- **Back** to return to the previous screen.

Tier and category	
Tier 2 (General - Extensions)	

CoS summary	
CoS number:	C2G3A34812A
CoS status:	ASSIGNED
Expiry date (use by):	06 June 2014
Passport number:	987654321
Family name:	Smith
Given name(s):	Josh
Nationality:	CHILE
Date of birth:	26/07/1971
Gender:	Male
Sponsor note:	

Back | Withdraw CoS | Sponsor note

Step	Instruction	Screen example
5	From the **Edit sponsor note** screen, enter the details you wish to add in the **Sponsor note** field, then select **Save**.	

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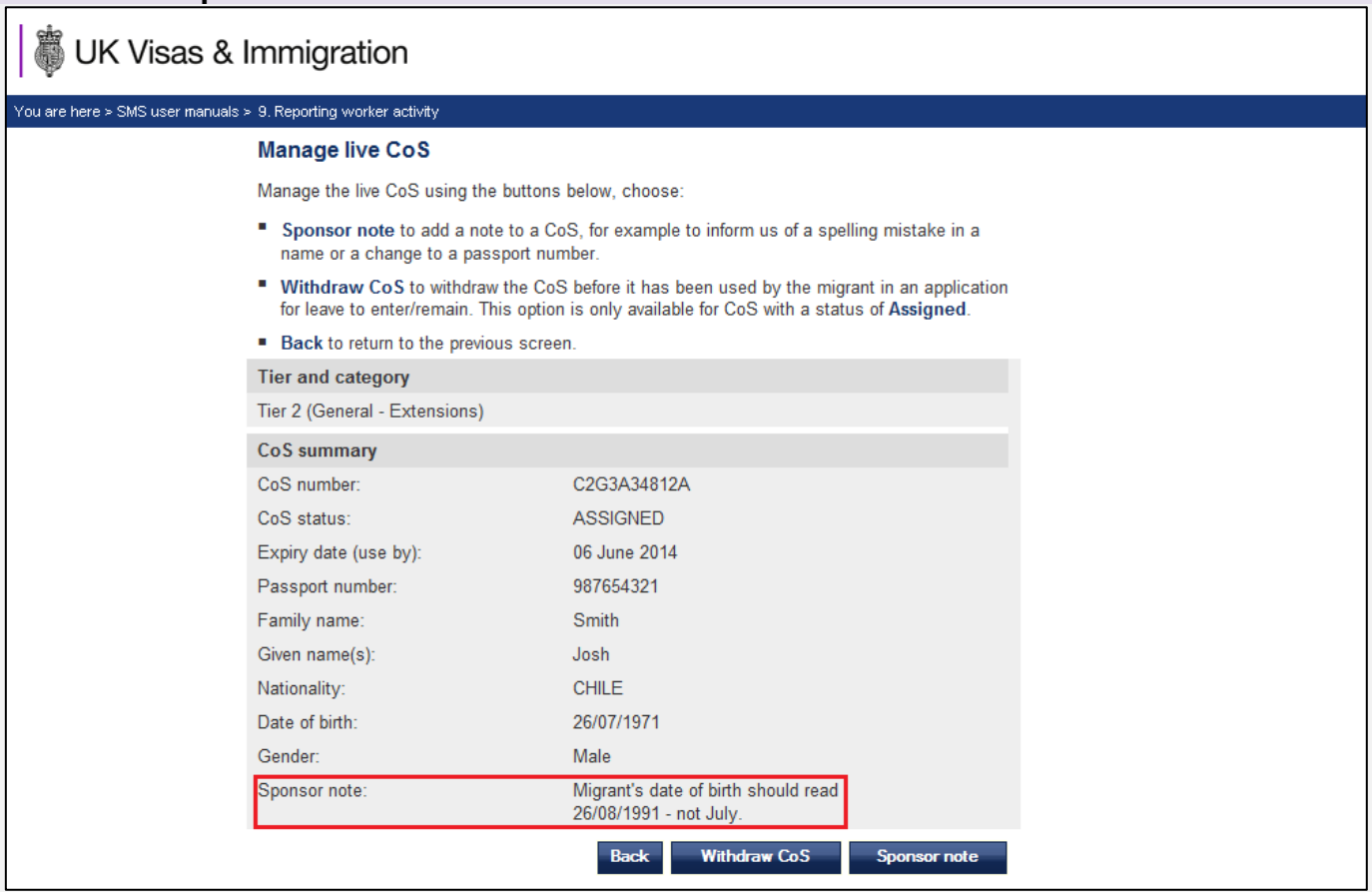
Edit sponsor note

To edit the sponsor note, add the information required. If you are amending the note, you can either overtype the existing text or add additional text. Any text that is overtyped will not be saved, so do not overtype any existing text if it is still relevant. Choose **Save** to confirm your changes or choose **Cancel** to return to the previous screen.

Tier and category	
Tier 2 (General - Extensions)	
CoS summary	
CoS number:	C2G3A34812A
CoS status:	ASSIGNED
Expiry date (use by):	06 June 2014
Passport number:	987654321
Family name:	Smith
Given name(s):	Josh
Nationality:	CHILE
Date of birth:	26/07/1971
Gender:	Male
Sponsor note:	

Cancel Save

Note

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

Step	Instruction	Screen example
6	From the **Manage live CoS** screen, the note you created is displayed.