



UK Visas
& Immigration

The sponsorship management system (SMS) manuals

Step by step guide for sponsors

Manual 10 of 12: Miscellaneous CoS functions

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Additional SMS manuals

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

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

Manual reference	Manual title	Type	Purpose	Audience
Manual 1	Introduction to SMS	Common	<p>Use this manual to log into SMS, change your password, manage SMS users and view important messages posted by the Home Office.</p> <p>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.</p>	All sponsors
Manual 2	Managing your licence	Common	To help sponsors manage their key personnel, change their licence details, and apply for allocations of CoS/CAS.	All sponsors
Manual 3	Applications, renewals and services	Common	To help sponsors apply for Premium customer service, apply or decline to apply for a Basic Compliance Assessment, renew their sponsor licence and manage action plans.	All sponsors

Manual 4	Creating and assigning CAS	CAS	To help sponsors create and assign individual and batches of CAS.	Sponsors licensed in Tier 4 (General and / or Child)
Manual 4a	Creating a CAS – guide for education sponsors	CAS	This guide 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 Tier 4 (General and / or Child)
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 Tier 4 (General and / or Child)
Manual 6	Bulk Data Transfer of CAS	CAS	To help sponsors use the bulk data transfer (BDT) functions of SMS. You must have a bespoke IT system in place to use BDT.	Sponsors licensed in Tier 4 (General and / or Child)
Manual 7	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 Tier 4 (General and / or Child)
Manual 8	Creating and assigning CoS	CoS	To help sponsors create and assign individual and batches of CoS.	Sponsors licensed in any Tier 2 or Tier 5 category

Manual 8a	Creating a CoS – guide for business sponsors	CoS	This guide contains supplementary information on completing a CoS. Use this guide to determine what information is necessary in each field of the CoS.	Sponsors licensed in any Tier 2 or Tier 5 category
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 Tier 2 or Tier 5 category
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 Tier 2 or Tier 5 category
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 any Tier 2 or Tier 5 category
Manual 12	Restricted CoS	CoS	To help sponsors apply for restricted CoS, track applications for restricted CoS and once granted, create restricted CoS.	Sponsored licensed in Tier 2 (General)

Glossary

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 address, or that 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	The CoS has been created and is ready to be assigned to an individual.
ASSIGNED	All mandatory fields are complete and the CoS is ready to use in support of an application for leave to enter or remain.
WITHDRAWN	You have withdrawn 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 category / your whole licence prior to the CoS being used.

SMS guides

Guide 1: How to transfer CoS ownership, view CoS history and other CoS administration functions

Follow the step by step instructions below to perform CoS administration tasks, which includes:

- viewing CoS details;
- printing a CoS for your records or for a migrant to use in support of their application;
- transferring ownership of CoS between SMS users;
- viewing the history of ownership of a CoS; and
- viewing reported history of a CoS.

Step	Instruction	Screen example
1	From the Workers screen, select View 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 \(opens in a new window\)](#)

- 2 From the **View CoS** screen, select **Search for CoS**.

View CoS

Search for an existing CoS by entering the individual's details. You must enter either the passport number or family name; you can also refine your search by entering the given name and/or date of birth. Choose **Next** to continue.

[Help \(opens in a new window\)](#)

Search for a CoS

Passport number:	<input type="text"/>
Family name:	<input type="text"/>
Given name(s):	<input type="text"/>
Date of birth:	<input type="text"/> <input type="text"/> <input type="text"/>

[Back](#) [Advanced](#) [Next](#)

3

From the **View CoS** screen, enter the parameters you wish to search against, 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 view. If your search parameters are specific, you will be presented with the screen below.

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From the **View CoS** screen, ensure the details are correct.

You now have five options:

- Select **Back** to return to the **CoS search results** screen;
- Select **Status history** to display the status history of the CoS, for example, READY TO GO, ASSIGNED or WITHDRAWN;
- Select **Activity history** to display any details reported for the individual using the **Report Migrant Activity** function (this can only apply to CoS with a status of USED); or
- Select **Transfer** to transfer a CoS to another SMS user.

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View CoS

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

- **Status history** to view the history of any status changes of the CoS
- **Activity history** to view any activity reported against the migrant
- **Transfer** to transfer the CoS to another user (where permissions allow)
- **Print** to save or print a .pdf of the CoS
- **Back** to return to the previous screen

Tier and category	
Tier 2 (General - Extensions)	
CoS status	
Sponsor licence number:	88MRN52B3
Sponsor name:	R500UAT026
CoS number:	C2G2Z94812A
Personal information	
Family name:	Smith
Given name(s):	Sam
Give registration details if there is a legal requirement for the migrant to be registered with a professional or other official organisation in the UK:	
Tick to confirm the sponsor certifies maintenance for the migrant:	Y

[Back](#) [Print](#) [Status history](#) [Activity history](#) [Transfer](#)

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To Transfer:

From the **Transfer a single CoS** screen, select the relevant user from the drop-down list, then select **Transfer**.

The screenshot shows the 'Transfer a single CoS' interface. At the top, it says 'UK Visas & Immigration' and 'You are here > SMS user manuals > 10. Miscellaneous CoS functions'. The main heading is 'Transfer a single CoS'. Below this, a message states: 'To transfer this single CoS to another user select the user you would like to transfer the CoS to, then choose **Transfer**. Choose **Cancel** to return to the view CoS details page.'

The interface contains several sections:

- Tier and category:** Tier 2 (General - Extensions)
- CoS details:** CoS status: USED
- CoS summary:** Passport number: 65465465465654654, Family name: Smith, Given name(s): Sam, Nationality: BERMUDA, Date of birth: 28/10/1979, Gender: Male
- User transferring CoS to:** A dropdown menu with 'Please select' and a downward arrow. This section is highlighted with a red border.

At the bottom right, there are two buttons: 'Cancel' and 'Transfer'.

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The CoS has been transferred.

Select **OK** to return to the **View CoS** screen.

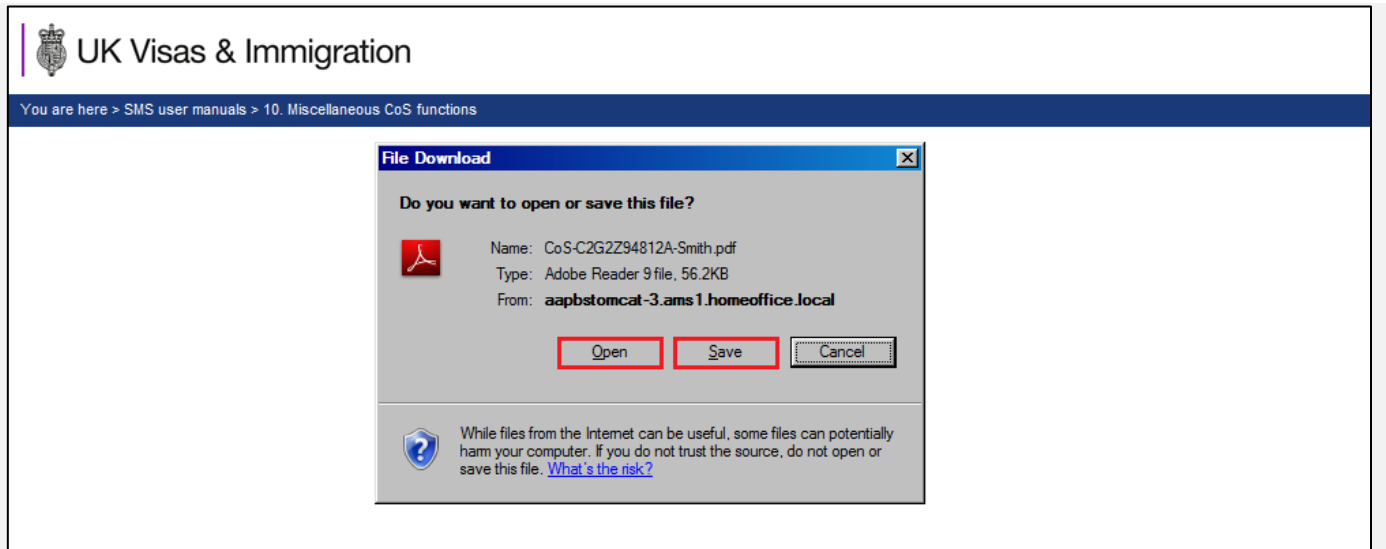
The screenshot shows the 'Transfer of single CoS complete' confirmation screen. At the top, it says 'UK Visas & Immigration' and 'You are here > SMS user manuals > 10. Miscellaneous CoS functions'. The main heading is 'Transfer of single CoS complete'. Below this, a message states: 'The transfer has completed successfully. Choose OK to continue.'

At the bottom right, there is a single button labeled 'OK'.

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To Print:

A **File Download** dialogue box will appear, from which you can choose **Open** to produce a printable PDF version or **Save** to save the PDF file to your own records and print later.





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Certificate of Sponsorship Details

Tier and Category

Tier and Category: Tier 2 (General - Extensions)

Certificate of sponsorship status

Sponsor licence number: 88MRN52B3
Sponsor name: R500UAT026
Certificate number: C2G2Z94812A
Current certificate status: USED
Current certificate status date: 05 March 2014
Date assigned: 05 March 2014
Expiry date (use by): 06 June 2014
Sponsorship withdrawn: N
Sponsor note:
Migrant application status:

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When the PDF file is opened, use your print command from your browser/PDF viewer to produce a hard copy.

Note

1. The keyboard shortcut for printing is CTRL+P on a computer running Windows or CMD+P on a computer running OSX.
2. You will only be able to open and print the PDF version of the CoS if you have the appropriate software installed, such as Adobe Acrobat Reader or an appropriate browser extension.

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To view status history:

From the **View CoS status history** screen, you can see the status and date on which the CoS moved to its current status. When complete select **Back** to return to the previous screen.

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View CoS status history

The table below shows the history of status changes for the CoS selected (in descending date and time order). The current status is shown at the top of the list. Choose **Back** to return to the view **View CoS** screen.

Status	Date and time	User name
USED	05/03/2014 12:29	Cory T
ASSIGNED	05/03/2014 10:41	Don D
READY TO GO	05/03/2014 10:37	Don D

Back

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To view activity history:

From the **View CoS activity history** screen, select the reported activity for which you wish to view further details, then select **Next**.

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View CoS activity history

The table below shows the history of reported activity for the migrant related to the CoS selected (in descending date and time order). The latest reported activity is shown at the top of the list.

If the table is blank, migrant activity has not been reported through SMS. To view further details, select the activity and choose **Next** or choose **Back** to return to the **View CoS** screen.

Date and time	Type of activity
05/03/2014 12:31	Sponsor continuing to sponsor migrant worker

Back Next

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From the **View CoS activity details** screen you can see when the activity was reported, the CoS number and the details of the activity. When complete select **Back** to return to the previous screen.

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View CoS activity details

The details for the selected activity are shown below. Choose **Back** to return to the previous screen.

Activity details	
CoS number:	C2G2Z94812A
Type of activity:	Sponsor continuing to sponsor migrant worker
Activity reported:	05 March 2014 12:31
Select details:	Worker start date delayed
Relevant date:	27 March 2014
Give full details:	Delayed travel due to birth of son.

[Back](#)

Guide 2: How to transfer a batch of CoS to another user

Follow the step by step instructions below to transfer ownership of a batch to another user. This function is useful if an existing SMS user will no longer be using SMS, or if a SMS user is taking ownership of another SMS user's workload.

Step	Instructions	Screen example
1	From the Workers screen, select View CoS .	 <p>UK Visas & Immigration</p> <p>You are here > SMS user manuals > 10. Miscellaneous CoS functions</p> <h3>Workers</h3> <p>Select the function you wish to perform. Details of each function can be found under each link and additional details can be obtained from the Help links. You may also use the menu left-hand side of the screen.</p> <p><u>Create and assign</u></p> <ul style="list-style-type: none">▪ Create single CoS▪ Create group CoS▪ Create batches of CoS▪ Amend information on a CoS before it is assigned▪ Assign CoS to migrants <p>Help (opens in a new window)</p> <p>View CoS</p> <ul style="list-style-type: none">▪ View CoS▪ Print CoS▪ View status and activity history of CoS▪ Transfer CoS, batches and groups between users (where user permissions allow)

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 \(opens in a new window\)](#)

- 2 From the **View CoS** screen, select **Search for batch(es) of CoS**.

Search for batches of CoS

Search for an existing batch of CoS by completing at least one line of search criteria, and choose **Next** to continue. Choose **Back** to return to the view CoS menu page.

[Help \(opens in a new window\)](#)

Batch search criteria

Batch name:

Owner:

Please select

Category:

Please select

Batch created from:

Batch created to:

Work in progress:

Ready to go:

Assigned:

[Help \(opens in a new window\)](#)

3 From the **Search for batches of CoS** 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 batches. This screen is not featured in this guide. Select the batch you wish to transfer. If your search parameters are specific, you will be presented with the screen below.

CoS search results

The table below shows CoS that match your search criteria, or the contents of the batch you selected. To view in more detail, select the CoS that you wish to view and choose **Next**. If you are a Level 1 user and you have searched for a batch you will have the option to choose **Transfer** to transfer the batch to another user. Choose **Back** to return to the previous screen.

Tier and category

Tier 2 (General - Extensions)

Batch details

Batch name: Batch #1
 Number of CoS in batch: 2
 Owner: Don, DJ (OsNBX7uVOL)
 Status: ASSIGNED
 Date created: 05/03/2014

Search results

	Number	Status	Family name	Given name	Date of birth	Nationality	Passport number	Migrant App. Status	Reported Activity
<input type="radio"/>	C2G3A24812A	ASSIGNED	Smith	Jade	27/09/1964	BOLIVIA	984		
<input type="radio"/>	C2G3A34812A	ASSIGNED	Smith	Josh	26/07/1971	CHILE	987654321		

4

From the **CoS search result** screen, select **Transfer**.

5

From the **Transfer batch of CoS** screen, select the user to whom you'd like to transfer the batch from the drop-down list, then select **Transfer**.

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Transfer batch of CoS

To transfer this batch of CoS to another user, select a user you would like to transfer the batch of CoS to, then choose **Transfer**. Choose **Cancel** to return to the view CoS search page.

Tier and category
Tier 2 (General - Extensions)

Batch details

Batch name:	Batch #1
Number of CoS in batch:	2
Owner:	Don, DJ (OsNBX7uVOL)
Status:	ASSIGNED

Transfer batch of CoS:
Select to whom you wish to transfer the batch:

6

The batch has been transferred. Select **OK** to return to **CoS search results** screen.

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Transfer of batch of CoS complete

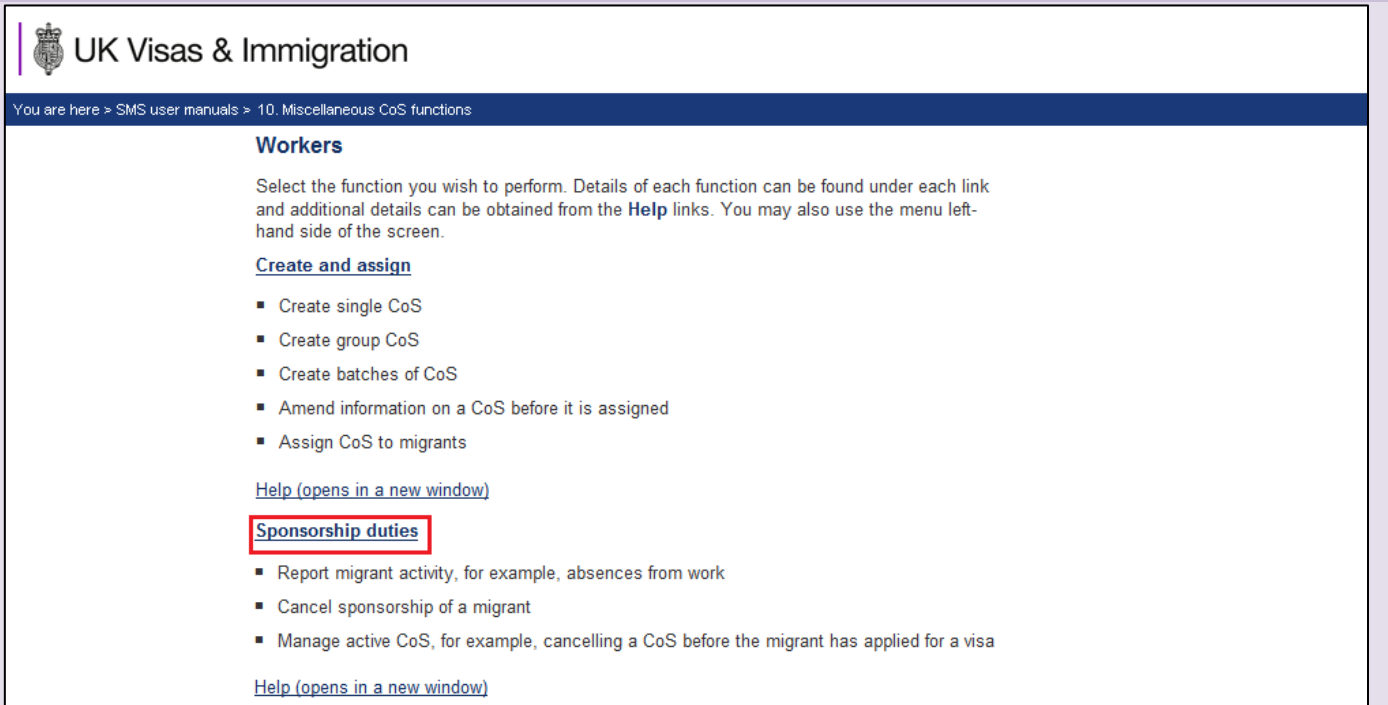
The transfer has been completed successfully. Choose **OK** to continue.

Guide 3: How to withdraw an unused CoS

Follow the step by step instructions below to withdraw a CoS with the ASSIGNED status. This function is useful if you decide not to sponsor a migrant before the CoS has been used in an application for leave to enter, leave to remain or worker authorisation.

CoS with the following statuses cannot be withdrawn: WORK IN PROGRESS; READY TO GO; USED; or EXPIRED. When a CoS is withdrawn it is not returned to your allocation, nor will you be refunded the fee paid when you assigned the CoS.

You should read the [guidance for sponsors](#) before withdrawing an unused CoS.

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

2 From the **Sponsorship duties** screen, select **Manage live CoS**.

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Sponsorship duties

As a sponsor, you have responsibilities to manage the migrants to whom you have assigned CoS. This section allows you to fulfil these responsibilities by reporting migrant activity and managing live CoS.

Please note, Level 2 users can only report on CoS which they own.

[Report migrant activity](#)

- Includes absences from work, invalid permission to stay, disciplinary actions or withdrawal of sponsorship

[Help \(opens in a new window\)](#)

Manage live CoS

- Withdraw an unused CoS
- Add or amend a sponsor note

[Help \(opens in a new window\)](#)

3 From the **Search for a CoS** screen, enter your search parameters, then select **Next**.

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Search for a CoS

To manage a CoS that has not yet been used by a migrant, search for the CoS using the CoS number or migrant personal information. Either the family name or passport number must be entered to search by migrant personal information. Choose **Next** to continue or **Back** to return to the menu.

Search by CoS number

CoS number:

Next

Migrant personal information search

Passport number:

Family name:

Given name(s):

Date of birth:

Next

Back

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

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

4

From the **Manage live CoS** screen, select **Withdraw CoS**.

If you wish to cancel the withdrawal, select **Back**.

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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:	Migrant's date of birth should read 26/08/1991 - not July.

[Back](#) [Withdraw CoS](#) [Sponsor note](#)

From the **Withdrawal confirmation** screen, select **Withdraw CoS**.

5 If you wish to cancel the withdrawal, select **Cancel**.

Once the CoS has been withdrawn, you will be returned to the **Search for a CoS** screen.

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Withdrawal confirmation

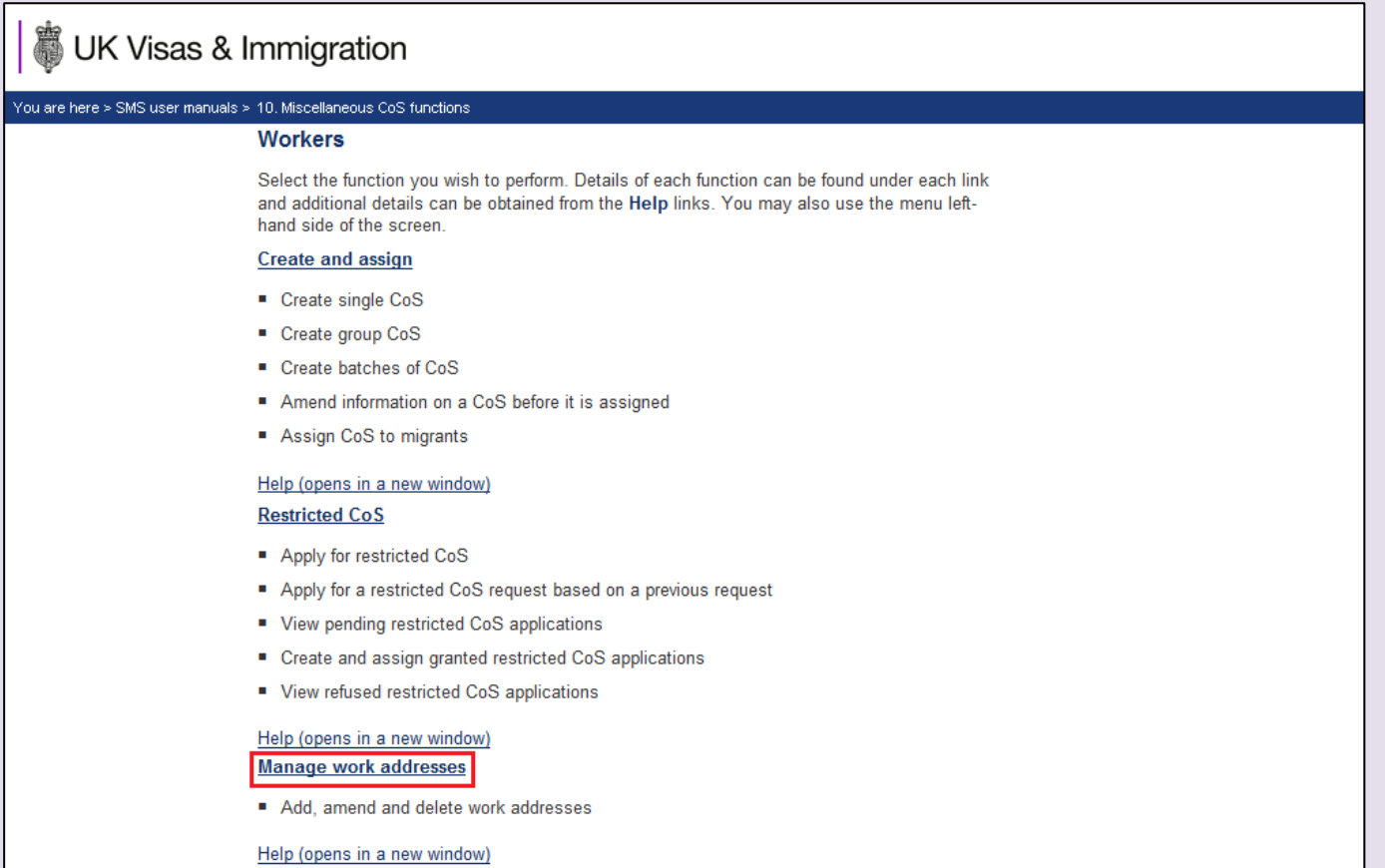
Confirm you want to withdraw this CoS by choosing **Withdraw CoS**. If you choose to withdraw the CoS the migrant will no longer be able to use it.

[Help \(opens in a new window\)](#)

Tier and category	
Tier 2 (General - Extensions)	
Certificate of sponsorship (CoS)	
CoS number:	C2G3A34812A
CoS status:	ASSIGNED
Expiry date (use by):	06 June 2014
Passport number:	987654321
Family name:	Smith
Given name(s):	Josh
Nationality:	CHILE
Date of birth:	26/07/1971
Gender:	Male
Sponsor note:	Migrant's date of birth should read 26/08/1991 - not July.


Guide 4: How to add, amend or delete work addresses

Follow the step by step instructions below to add, amend or delete a work address. This function is useful if you wish to store several addresses that you use frequently when creating CoS. Saved addresses will be available from the **Pre-stored address** drop-down list on the **Add or amend a work address** screen in all CoS that you create afterwards.

Step	Instruction	Screen example
1	From the Workers screen, select Manage work addresses .	

2

From the **Manage work addresses** screen, select **Add** to add a new address, or to delete or amend an existing address, select the **Address identifier**.

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Manage work addresses

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

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

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

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

Work addresses

Address identifier	Address line 1	City or town
Four and Three Street	4 and 3 Street	Sheffield
Seven and Two Road	7 and 2 Road	Sheffield

[Add](#)

[Back](#)

Add work address

Complete the fields below to add a new work address. Fields marked with an asterisk (*) are mandatory and must be completed. When choosing an **Address identifier**, it is recommended that you choose a meaningful name, such as a road or building name, as this will make it easier to identify the correct address when completing a CoS or editing the work address.

Choose **Save** to add the address to the list, or **Cancel** to return to the Manage work addresses screen.

Work address	
Address identifier *	<input type="text"/>
Help (opens in a new window)	
Address: *	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
City or town: *	<input type="text"/>
County, area district or province:	<input type="text"/>
Postcode: *	<input type="text"/>
Contact name: *	<input type="text"/>
Contact telephone: *	<input type="text"/>

Cancel

Save


To add an address:

- 3 On the **Add work address** screen, ensure you complete all mandatory fields, then select **Save**.

To delete or edit an address:

4 From the **Edit work address** screen, change the address details as necessary, then select **Save**.

To delete the address, select **Delete**.

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Edit work address

Edit the fields below to amend a work address. Fields marked with an asterisk (*) are mandatory and must be completed. When choosing an **Address identifier**, it is recommended that you choose a meaningful name, such as a road or building name, as this will make it easier to identify the correct address when completing a CoS or editing the work address.

Choose **Save** to add the address to the list, or **Cancel** to return to the Manage work addresses screen.


Work address

Address identifier	*	<input type="text" value="Nine and Eight View"/>
Address:	*	<input type="text" value="9 and 8 View"/> <input type="text"/> <input type="text"/>
City or town:	*	<input type="text" value="Sheffield"/>
County, area district or province:		<input type="text"/>
Postcode:	*	<input type="text" value="S1 1AS"/>
Contact name:	*	<input type="text" value="Candy Rellington"/>
Contact telephone:	*	<input type="text" value="0114 2091324"/>

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

To delete:

5 From the **Delete work address** screen, select **Delete**.

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Delete work address

Choose **Delete** to confirm you want to delete this work address from your list, or **Cancel** to return to the Manage work addresses home page. If you choose to delete an address from the list, this action cannot be reversed. Deleting the address will not remove it from any CoS to which it has previously been added.

Work address

Address identifier	Nine and Eight View
Address line 1:	9 and 8 View
City or town:	Sheffield

