

Quick guide

Preliability transfer CoC for application corrections

When and why?

You must submit accurate and timely CoC notifications when a student's course details change. All CoCs must be submitted via SIS except for SAAS and PT Grant students (excluding new Welsh PT Loan and Grant students from AY 2014/15). You need to submit changes for SAAS students directly to SAAS and for PT Grant students you should request a CoC form by emailing coc@slc.co.uk.

A pre-liability CoC is where a change is made to a student's application before the point of liability. The point of liability is defined as the point at which a student becomes responsible for the repayment of a fee loan.

You can use a **Transfer CoC**:

- for application corrections to course and year information
- when a student transfers from one provider to another (external transfer)
- when a student transfers to a different course at your university or college (internal transfer)

You should use a pre-liability **Transfer CoC** to correct an application before a student attends if they are showing on SIS with the incorrect course or year. This document will tell you how you can submit CoCs in these circumstances.

The service level for pre-liability application correction Transfer CoC processing is 20 working days, or 30 working days in peak periods (August to end of November). Pre-liability Transfer CoCs can also be processed via the automated service if they match the required criteria. The processing time for an automated CoC is 48 hours.

Access

You must hold CoC Administrator access on SIS to create CoCs. If you need this to be added to your account you should contact the User Administrator at your university or college.

Create pre-liability Transfer CoC for application corrections

You can create a CoC from the **CoC Worklist**, the **Detailed Student Information** screen, the **Create CoC** screen or via bulk xml file upload in the **CoC Home** area of SIS. This quick guide will tell you how to do it from the **Create CoC** screen.

- Select **CoC Home** from the left-side menu on the **SIS Home** page.
- The **CoC Home** menu will be visible showing the CoC sub-areas that apply to your user access level.
- Select **Create CoC**.

You must now select the type of CoC you want to create:

- Select **Transfer** from the **Change of Circumstance category** dropdown menu
- Select the academic year you want to apply this CoC to from the **Academic Year** dropdown menu.
- Select the **Next** button.

You will now be prompted to enter the details of the student that you want to apply this CoC to. You can enter the **SSN** (student support number) in the search box to find the student's details by

- You can add up to 20 students to this CoC by selecting the green **+** icon. Keep in mind that you will be submitting this CoC for all students you add to the list, so you should ensure the change details apply to them all.
- Select the **Next** button.

You will see the **Change of Circumstance Details** screen where you can enter the specific details of the change.

Change of Circumstance - Transfer

Change of Circumstances and Academic Year Help

Level Of Funding: Undergraduate
Change of Circumstance Category: Transfer
Academic Year: 18-19
Mode of Study: PT

Change of Circumstance Details

Inform about a student transferring to my HEP or transferring within my HEP

Transfer Effective Date (dd/mm/yyyy): 01/09/2018
Expected Date of Completion of New Course (mm/yyyy): 09/2022
Tuition Fee for New Course: 6500

Further explanation if required

Other Course/Fee Changes

Course Tuition Fee Liability: 7000
Credits: 15

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This image above shows the Change of Circumstance window for a transfer CoC.

To make pre-liability application corrections using a Transfer CoC you must:

- Select the **Inform about a student transferring to my HEP or transferring within my HEP** radio button.
- Enter the **Transfer Effective Date** – for a pre-liability CoC this must be before the first day of the student’s course year start date.
- Enter the **Expected Date of Completion of New Course** – the month and year the student will complete the course.
- Enter the **Tuition Fee for New Course** – the amount of tuition fee you will charge the student, this must be the total fee for the year (100%) as this is a pre-liability change.
- Enter the **Course Tuition Fee Liability** – this is the amount of tuition fee the student is liable for and must be the total for the year (100%). This field should match the **Tuition Fee for New Course** field unless the student is paying a proportion of their fee themselves.
- For Part-Time Maintenance Loan (PTML) students only, enter a **Credits** value – this is the amount of credits that the student will be undertaking at your university or college in that academic year only.

If required, you can now include additional notes with this CoC by typing into the **Further Explanation If Required** box.

Including notes with a pre-liability Transfer CoC means it will not be automatically processed and the CoC will be handled in the 20/30 working day SLA processing time. It is important that you only add notes when needed.

When you have entered all the details for the CoC, select the **Next** button to continue.

For part-time students transferring there is an additional scenario when submitting a transfer CoC for an academic year before 2018. From 2018 onwards, current year start date (CYSD) will not appear in the CoC as we hold term dates for part-time courses on CMS. If a student is changing the start date of their course they will need to be transferred onto the appropriate course.

- Transfer due to change in current year start date (CYSD) – in this case you need to update the CYSD only for the same course. You will not be able to submit this type of CoC once you have submitted an attendance confirmation.

You will now see the **Course Details** screen where you can search to find the correct course. When you have chosen the correct details select the **Next** button.

You must now select a contact for this CoC. This will be a registered person at your university or college who can be contacted about this CoC. Select the contact using the radio button, then select the **Next** button.

The **CoC Summary** screen will then display a read-only version of the details you have entered so you can review them.

When you have reviewed the information select the **Submit** button.