

---

## Quick guide

# Transfer in CoC

### When and why?

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

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/transfer in)
- when a student transfers to a different course at your university or college (internal transfer)

You can use a Transfer In CoC pre or post-liability. You should submit a pre-liability Transfer In CoC when a student has entered the incorrect university or college on their application. You should use a post-liability Transfer CoC when a student has transferred to you from another university or college during the academic year.

The service level for CoC processing is 20 working days, or 30 working days in peak periods (August to end of November).

### 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 Transfer In CoC

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 tells you how to use 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 choose 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.

- 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. For a **Transfer In 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** – this should be the date that change took place. If this was before the course started this date should be before the course start date
- enter the **Expected Date of Completion of New Course** – this is the month and year the student will complete the new course
- enter the **Tuition Fee for New Course** – this is the remaining amount of tuition fee available to the student, dependent on how long they attended their previous university or college (100%/75%/50%)
- enter the **Course Tuition Fee Liability** – this is the amount of tuition fee the student is liable for. 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.

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

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.