

## Quick guide

# Provider Transfer CoC

### When and why?

It is your responsibility to submit accurate and timely Change of Circumstance notifications (CoCs) when students change courses. All CoCs for PG Master's and Doctoral Loans must be submitted via the Student Information Service (SIS).

You can use a Provider Transfer CoC when a student moves to your organisation during the academic year.

### Access

To create CoCs you must hold the CoC Administrator user role in SIS. If you need this to be added to your account, you should contact the User Administrator at your university.

### Create a Provider Transfer CoC

You can create a PG CoC from either the **Detailed Student Information** screen or the **Create CoC** screen in the **CoC Home** area of SIS. This quick guide will tell you how to use the **Create CoC** screen:

- first, select **CoC Home** from the left-side menu on the **SIS Home** page
- the **CoC Home** menu will appear and will show all the CoC subareas that apply to your user access
- select **Create CoC**

Next, select the level of funding of the CoC you want to create:

- select **Postgraduate** from the **Level of Funding** dropdown menu
  - select **Provider 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
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The system will now prompt you to enter the details of the student you want to apply this CoC to. You can enter the SSN (student support number) or the CRN (Customer Reference Number) to identify the student. However, as they are not currently attending your university, you must also manually enter the student's details. As this CoC is a provider transfer, SIS will validate the student has an application but is not currently attending your university before it lets you proceed.

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 the students you add to the list, so the change details must apply to them all.

Once you have added all the students, select the **Next** button.

- The **Change of Circumstance Details** screen will display. Here, you can enter the specific details of the change. This area also includes a new section that shows the student details you have entered.

**Change of Circumstances and Academic Year** Help

Level of Funding:  Change of Circumstance Category:

Academic Year:  Mode of Study:

**Student Details**

Row	SSN	Surname	Forename(s)	Date of Birth
1	SFDU16136061H	boyd	ashley	07/08/1987 (dd/mm/yyyy)

**Change of Circumstance Details**

Transfer Effective Date (dd/mm/yyyy):  Course Year the Student will enter:

This image shows the Change of Circumstance Details screen

To submit a Provider Transfer CoC:

- enter the **Transfer Effective Date** – this should be the date the student transferred to the new course at your organisation
- select the correct course year from the **Course Year the Student will enter** dropdown menu

When you have entered all the details for this CoC, select the **Next** button to continue, then select the new course for the student.

The **Course Details** screen will now be displayed. Here, you can search to find the student's new course. The results will only include valid PG master's and doctoral courses (dependent on the student's level of funding) from the Courses Management Service (CMS). The course start date and qualification have been added to the results table so you can easily find the correct course. When you have selected the correct details select the **Next** button.

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SLC Course Code <sup>1</sup>	Course Name	Course Start Date	UCAS Course Code	Qualification	Method of Attendance	Campus ID	Course Status
<input checked="" type="radio"/> 884094	PGL APPLY TAUGHT FT 1 YR DISTANCE LEARNING SEPTEMBER-ENG	05/09/2016		PG-TM	Full Time Distance Learning		Open

This image shows how a course will appear in the course details screen when you are selecting which course the student is transferring to.

You must now select a contact for this CoC. This will be a registered person at your organisation 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 show a read only version of the details you have entered.

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