

Quick Guide – Provider Transfer CoC

When and Why?

It is the HEP's responsibility to submit accurate and timely Change of Circumstance notifications when a student changes course. All CoCs must be submitted via the Student Information Service (SIS) for PG Master's and Doctoral Loans.

A Provider Transfer CoC can be used when a student moves to your institution during the academic year.

Access

To create CoCs you must hold the CoC Administrator user role within SIS. If you need this access to be added to your account you can contact the User Administrator within your HEP.

Create Provider Transfer CoC

You can create a PG CoC from either the Detailed Student Information screen or the Create CoC screen within the CoC Home area of SIS. For the purpose of this quick guide you will use the Create CoC screen.

- To access this area select **CoC Home** from the menu on the left on the SIS Home page
- The CoC Home menu will appear and will show all of the CoC sub areas that apply to your user access
- Select **Create CoC**

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

- Select **Postgraduate** from the Level of Funding drop down menu
- Select **Provider Transfer** from the Change of Circumstance Category drop down menu
- Select the **Academic Year** you want to apply this CoC to from the Academic Year drop down menu
- Click the **Next** button

You will now be prompted to enter the details of the student who you want to apply this CoC to. You can enter the **SSN** (student support number) or the **CRN** (Customer Reference Number) to identify this student, but as they are not currently attending your Provider you must also manually enter the student's details. As this CoC is a Provider Transfer, SIS will validate the student you are entering has an application but is not currently attending your institution before allowing you to proceed.

- You can add up to 20 students to this CoC by selecting the green plus icon. It is important to note you will be submitting this CoC for all students added to the list, therefore you should ensure the change details apply to them all
- Click the **Next** button

The Change of Circumstance Details screen will display to enter the specific details of the change. A new section has been included in this area to display 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:

To submit a Provider Transfer CoC:

- Input the **Transfer Effective Date** – this should be the date the student transferred to the new course at your Provider
- Input the correct course year from the **Course Year the Student will enter** drop down menu

When you have input all the details for this CoC, select the **Next** button below the details to continue and 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 only courses that will be displayed in the results screen are valid PG Master's/Doctoral courses (dependent on the individual student's level of funding) from the Courses Management Service. Course Start Date and Qualification has been added to the results table to allow you to easily identify the correct course. When you have selected the correct details select the **Next** button.

| SLC Course Code† | 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 |

You must now select a **contact** for this CoC. This will be a registered person within your HEP who can be contacted regarding this CoC. When you have selected the contact using the radio button provided, click the **Next** button.

The CoC Summary screen will then display a read only version of all of the details you have entered to review before submission.

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