

## Quick Guide – Transfer In / Course Transfer CoC - SFNI PG TFL

### Purpose

This quick guide will show you how to create a Transfer In CoC (Change of Circumstance for students in receipt of SFNI Postgraduate Tuition Fee Loan in the Student Information Service (SIS).

### When and Why?

It is the responsibility of the HEP to submit accurate and timely Change of Circumstance notifications when a student's information changes.

A Transfer CoC can be used pre or post liability. A pre liability Transfer CoC is used when a student has indicated the incorrect HEP or course on their application. A post liability Transfer CoC is used when a student has transferred to you from another HEP or from one course to another within your HEP throughout the academic year.

### Access

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

## Create Transfer

You can create a CoC from either the CoC Worklist, the Detailed Student Information screen, the Create CoC screen or via bulk XML file upload 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 which apply to your user access
- Select **Create CoC**
- Select **Postgraduate NI** from the Level of Funding drop down menu

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

- Select **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 that you want to apply this CoC to. You can use the **SSN** (student support number) to find the student's details by entering it into the box provided and clicking the **find icon** beside the box.

- 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. For a Transfer In CoC you must:

- 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 prior to the course start
- Enter the **Expected Date of Completion of New Course** – the month and year the student will complete the new course
- Enter the **Tuition Fee for New Course** – the remaining amount of tuition fee available to the student dependent on how long they attended at their previous HEP or course (100%/75%/50%)
- Select **Yes** from the **Does Transfer have your academic approval** radio buttons - this means that your HEP has approved the transfer
- Enter the **Date Approval was given** – this is the date the academic approval was given for this transfer
- Select the correct course year from the **Which year of the course will the student enter** drop down menu
- 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

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

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

The Course Details screen will now be displayed. Here you must search to find the correct course. When you have selected the correct details select the **Next** button.

You must now **select a contact for this CoC**. This will be a registered contact 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.