Creating Student Records on SITS for Short Courses (QAS>ACD>ATR>SPR>RSM)

This guide covers how to create student records for students who have not gone through the main admissions application process. In this scenario the central admissions steps must be mimicked to create all required records to enable a student to successfully enrol onto a course

Access to admissions screens are limited to those with admissions functions only.

Overview
There are a number of steps to creating student records for students on short courses and research as defined below:
1. Creating an applicant record (QAS)
2. Generating a student number and duplicate matching
3. Adding address and personal/statutory return reporting details

If applicant is using online application the above steps can be ignored. They are kept in case there is problem with online applications and to speed the process you have to manually set them up on SITS.

4. Checking IPR for applicants not TRANsferred
5. Transferring an applicant to a student ready for enrolment (ACD & ATR)
6. Updating sponsor details
7. Checking the student record
8. Adding modules to a student record
9. Generating invitation to enrol email

1. Creating a New Applicant Record – QAS

The Quick Applicant Setup (**QAS**) screen is used to create applicant records on SITS. This is the screen used for applications that have not come via UCAS or the central SGUL admissions team/portal.

The screen has 5 sections:
- Stu Ap Status   Not Used
- MAS/MCR details   Details the course of study and entry year
- Agent   Not Used
- Student details   Details student related data
- Generate student application details   Enables the generation of the applicant record

Figure 1. QAS screen as pre-populated for MAS Course UTMHCP

Stu Ap Status

- Leave as is and move to the next section

MAS Course (MCR) Details

- Enter the appropriate <u>MAS code</u> in the *MAS course* field and tab out
    - o The fields in this section of the screen should pre-populate
- Check the Programme field
    - o If this has not been pre-populated by entering the MAS code, re-enter the same code
- Check the Route field
    - o If the pre-populated value is incorrect, clear the field and click on the chevron icon button to view a list of valid routes associated with the programme
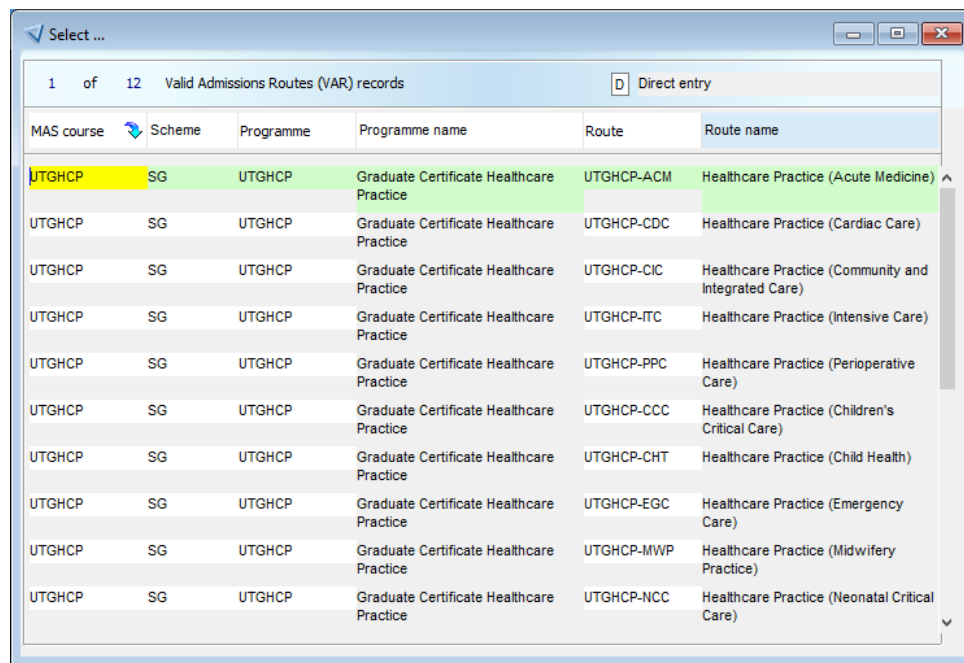   - o The Valid Admissions Routes (**VAR**) screen will appear

Figure 2. Valid admissions route (VAR) screen for MAS Course UTGHCP

- o Select the appropriate route from the list by double clicking
- o The selection screen will close and focus return to the **QAS** screen
- Check the *Block / Occ* field
  - o This will default to the block and occurrence associate with the MAS course (**MCR** record) and for programme with only 1 entry point per academic year will normally be 1 A
- Check the *Academic Year* field
  - o This should default to the current academic year
  - o If the application is for a future academic year amend accordingly

Agent

- Leave and move to the next section

Student Details

If the applicant is already an **existing student**
- Enter the student number and tab out of the field
  - o The fields in this section of the screen should pre-populate

If the applicant is **new** to St George's
- Leave the *Student Number* field blank
  - o This will be populated once records are generated later in the process
- Populate the following fields as per the application:
  - o *Surname*
  - o *Forenames*
  - o *Title*
  - o *Gender*

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- o *Date of birth*
- o *Email*
- Enter <u>H</u> in the *Fee Status* field (this stands for Home student)

Figure 3. Example of completed QAS screen

2. Generating a Student Number and Duplicate Matching

If the applicant is already an **existing student**

- Check that all relevant details in the previous sections are complete
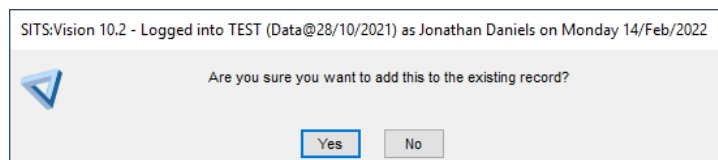- Click on the *Generate* button
- A confirmation dialogue box will appear:

Figure 4. Generate application record for existing student confirmation dialogue

- Click the *Yes* button and proceed to Step 4. of this guidance

If the applicant is **new** to St George's

- Check that all relevant details in the previous sections are complete
- Click on the *Generate* button
- Before creating records for a new person, the system will automatically check existing records for potential duplicates and use the following data items to give a % match:
  - Date of birth
  - Gender
  - Surname
  - Forename
- A pop-up screen will appear detailing potential matches
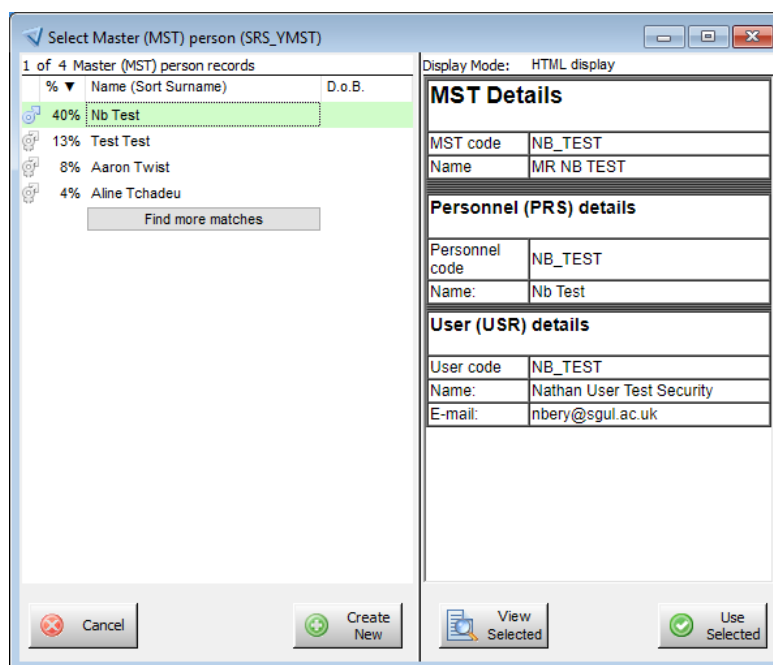
Figure 5. Select Master person screen showing potential duplicates and % match

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- - Where there is a high % match be prepared to check **SPR** to confirm if the applicant has an existing record
  - Where the personal details match an applicant on the database (i.e. it is clearly the same person) the existing database details must be used (address and contact details will need to be checked and updated)
  - If there is a match, select it and click on the *Use Selected* button, otherwise click on the *Create New* button
- The match screen will close and focus return to the **QAS** screen
- The *Applicant details* and *Student Number* field will now be populated with the applicant's unique student number

Figure 6. Example of populated QAS screen after record generation

- In the *Student Details* section there will be additional buttons on the right-hand side
  - Home   for home/permanent address details
  - Contact   for contact address details
  - Report fields   for recording HESA related data
- Write down or save the student number as you will need this for the next main steps

3. Adding Address and Personal (statutory return related) Details

Adding/Editing addresses

- In the *Student Details* section click on the *Home* button
- The View Student Addresses screen will appear
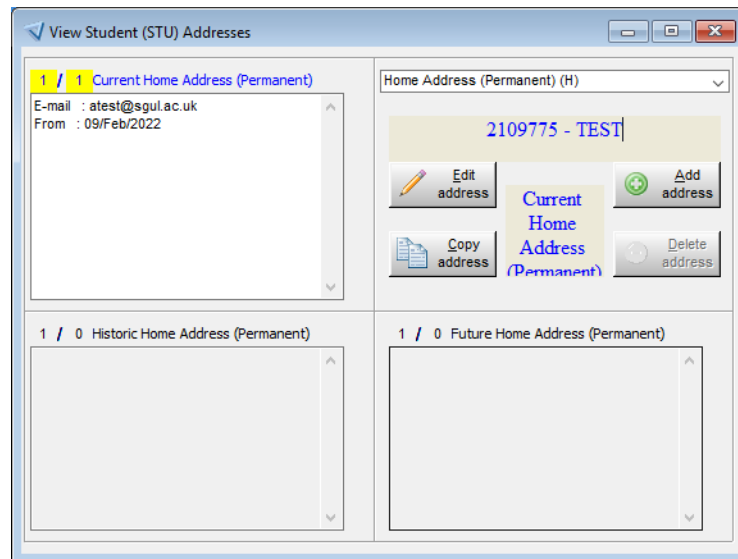
Figure 7. View Student Addresses screen for new student (no existing address information)

- If a new student, click the *Edit address* button, otherwise click the *Add address* button
- The Edit Student Address or Create Student Address screen will appear for edit and add respectively
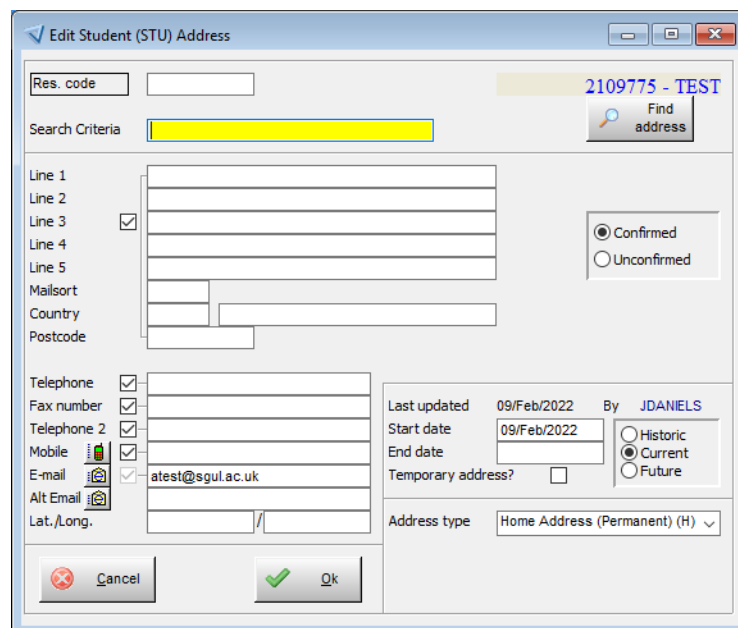
Figure 8. Edit Student Address screen for new student (no existing address information)

- Check email address
- Input permanent address and phone details

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- o   Note that the Find address facility is not active
- Once the details have been added click the *Ok* button
- Close the View Student Addresses screen, focus will return to the **QAS** screen
  - o   Note the question mark icon on the *Home* button will change to an envelope once an address has been added

Adding statutory return/personal data

- If personal /statutory return related data has been provided as part of the application process click on the *Report fields* button in the *Student Details* section (if not this will be collected during the online enrolment process)
- The Student Report Fields screen will appear. You will need to enter information on some of the fields presented and also via the *Equality data* and *additional details* buttons.

Figure 9. Student Report Fields screen for new student (no existing information)

- Input directly on this screen
  - o   *Ethnic Code*

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- o *Nationality*
- o *COD*
- o *Disability*
- o *Highest Qual*
- Remember if you do not know the codes you can double-click in the empty field to get a list of all values or to a search on partial values
- Click on the *Equality data* button
- A popup screen will appear

Figure 10. Student Fields for Equality Legislation screen

- Input
  - o *Religious belief*
  - o *Sexual orientation*
  - o *Gender identity*
- Click the *Apply* button
- The popup will close and focus return to the Student Report Fields screen
- Click on the *Additional Details* button
- The Student Additional Details (**STUA**) screen will appear

Figure 11. Student Additional Details screen

- Input
    - *Care Leaver*
    - *Standard Occupational Classification*
    - *ORCID identifier of student (applicable to research students only)*
- Store the record
- Close the Student Additional Details screen, focus will return to the Student Report Fields screen

- When you have finished adding all details click the *Apply* button
- The Student Report Fields screen will close and focus return to the **QAS** screen

You have now completed the applicant set-up stage

4. Checking IPR for applicants not TRANsferred

Retrieve on IPO Year equals your run year e.g. 2025/6
The applicants not transferred will have a Reg Status of 'Possible Duplicate' and a blank Transfer Date.

Go to TRAN

Input the IPP Code code, e.g., 'UTMOPEN' and the IPO Academic Year e.g. '2025/6'
Click the 'Applicants to MAS' button

The system will identify those IPR records not transferred – they need to be processed individually.

Click the 'Find Records' button

The system will show a message at the foot of the screen:-

Unprocessed DUP records exist for this applicant (00000000). Please use XDUP to match and import them.

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Copy the IPU User code e.g. 0606803

Open XDUP and past the ID into the 'Source' field – Retrieve.

If the duplicate match on the right is correct, tick the 'match' tickbox and click the 'Import Current' button

A confirmation dialogue box will appear; check that names and IDs as per XDUP and your chosen match then click the 'Yes' button.

The following screen will pop-up, click 'Run now' button.

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Return to your XDUP screen and click the 'Find' button again. The following dialogue will appear:

Click the 'Use DUP' button and the matched duplicate will appear on the right of the screen.

The right side of XDUP screen will be populated with your chosen record, click 'Transfer' button.

Once the transfer has completed, this will be indicated in the message display at the bottom of your SITS screen.

Carry out the same procedure (starting with 'Find Records') with the next record until you have completed the transfer process for everyone in the list.

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5. Transferring an Applicant to a Student Ready to Enrol (ACD and ATR)

Ordinarily upon creating an applicant record an institution will go through a full assessment of the application, accept or reject the application, make an offer for a successful application and record whether or not the applicant accepts the offer made. As our applicants are in essence module buyers, with the necessary checks occurring within their workplace and appropriately approved, in the majority of cases we bypass this process by:

- Confirming an unconditional offer – setting decision status to U
- Confirming offer firmly accepted – setting response to F
- Confirming qualification status – setting qual status to QV
- Confirming records are all in order and transfer applicant to student – ATR process

All of these steps occur in the principle admissions screen Applicant Clearance and Decision Making **(ACD)** screen.

Updating Applicant Decision - ACD
- Open the **ACD** screen
- Enter the student number in the *Applicant* ID field
- Retrieve the record

Figure 12. ACD screen as populated for the test student from previous sections

- Enter <u>QV</u> in the *Qual Status* field
- Enter <u>U</u> in *Decision* field under Stage 1
- Enter <u>F</u> in *Response* field under Stage 1
- Store the record
  - The Decision and Response Dates will automatically populate
- As short courses can have variable start and end dates <u>populate</u> the following fields – this is critical for access control and ID cards:
  - *Start*
  - *Exp End*
- Store the record

Transfer Applicant to Student – ATR
- Open the **ATR** screen
- Check that the academic year in the *Academic Year* field is correct
  - Amend if required for future year
- Enter the <u>student number</u> in the *Applicant* field and retrieve
  - This should pre-populate the rest of the fields

Figure 13. ACD screen as populated for the test student from previous sections

- Leave all field values and radio buttons in the bottom part of the screen as they are
- Click on the *Run Now* button

This process will create the student SPR number and their SPR, SCJ, and SCE records

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6. Updating Sponsor Details

For St George's students being registered on open spaces modules skip this stage and proceed to Step 6. Open Spaces module.

Where details are not held at a module level on **SSP**, sponsor details must be attached to the student's primary record **STU.**

- Open the Full Student Details Screen (**STU**)
- Enter the <u>student number</u> in the *Student* field
- Retrieve the record

Figure 14. STU screen for the test student from previous sections

- Add the appropriate codes to the *Employer* & *Sponsor* fields
  - o Note that double-clicking and scrolling through the list can be slow due to the number of sponsor records, it may be faster to search directly for the required code on the Sponsor (**SPO**) screen
- Store the record

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7. Checking that the Primary Student Record is Correct – SPR

The SPR record is part of the CAMS component of SITS where all award and assessment data is held and managed by the relevant programme administrative teams. Please check here that the correct 'intended award' has been generated by the ATR process and that the start and end dates are correct.

- Open the **SPR** screen.
- Enter the <u>student number</u> followed by wildcard goldstar in the *SPR Code* field
- Retrieve the record

Figure 15. SPR screen for the test student from previous sections

- Check the following fields
    - *Intended Award*
    - *Start Date*
    - *Expected End Date*

<u>St George's Students on Open Spaces Modules</u>
- Check the module has been added to the student's record via the ATR process (where a diet has been set up linked to the course, block and occurrence).
    - Open the *Other* menu on the menu bar
    - Go to the *Module* submenu and select the *Taking* option
    - Confirm a module taking record has been created for module code HUM601 and the correct year/period/occurrence
    - **If the module has been correctly added, all required student records have now been created and you can proceed to Step 8. If not, proceed to Step 7. of this guidance**

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8. Adding Modules to Individual Students Using RSM

Modules that need to be added on an individual student basis are handled via the Replace & Schedule Student Module (**RSM**) screen

- Open the **RSM** screen
  - o This is the screen we currently use to add module taking (SMO) records
- Add the Year, Period (usually Y, T1, T2 or T3) and relevant SPR Code to the respective fields
- Enter the module code into the *Module* field in the Add section of the screen
- Enter the occurrence, as per the MAV record, into the *Occurrence* field in the same section

Figure 16. Example of completed RSM screen

- Click the green play icon button in the bottom right hand corner of the screen.
- A confirmation dialogue box will appear

Figure 17. Module scheduling confirmation dialogue

- Click the *Continue* button
- The process will run immediately, check SMO to verify the record has been created

All required student records have now been created and the admissions process is complete

9. Sending Invitation to Enrol Email

<u>All</u> students are required to enrol onto their course and complete the online enrolment process.

- Open the **SCE** screen.
- Retrieve students records by number or by year, course, block and occurrence.
- Go to "All" on the menu bar and select *Gen+Print* letters.
- Enter <u>ENR_NWPED_E1</u> in the *letter code* field for professional education or alternative code if you have a course specific invitation.
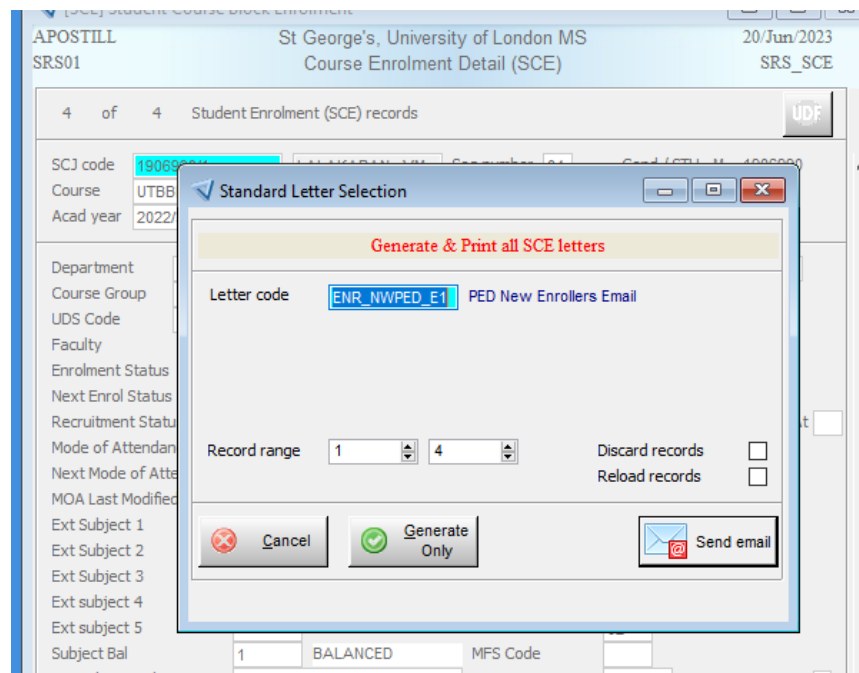- Click on the *Send email* button.

Figure 18. Example of enrolment invitation process box

All processes are complete and the student will receive an invitation to enrol via eVision