

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
4. Transferring an applicant to a student ready for enrolment (ACD & ATR)
5. Updating sponsor details
6. Checking the student record
7. Adding modules to a student record
8. 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

The screenshot shows the 'QAS Quick Applicant Setup' window for St George's, University of London MS. The window title is '[QAS] Quick Applicant Setup'. The user is JDANIELS, MAS01, and the date is 08/Feb/2022. The screen is divided into several sections:

- Stu Ap status:** A dropdown menu set to 'A'.
- APPLICANT:** A label for the applicant type.
- APF status:** A dropdown menu set to 'A'.
- CAP status:** A dropdown menu set to 'A'.
- Reset to Defaults:** A button with a circular arrow icon.
- 1 of 1 MAS Course (MCR) records:** A section for course details.
 - MAS course:** UTMHCP (Undergraduate Healthcare Practice - Module Only)
 - Block / Occ:** 1 / A
 - Programme:** UTMHCP (Undergraduate Healthcare Practice - Module Only)
 - Route:** UTMHCP (Undergraduate Healthcare Practice - Module Only)
 - Academic year:** 2021/22
 - Entry Month:** 09 (September Term 1)
 - Attendance mode:** PS
 - PART TIME STD:** A checkbox.
 - Department:** JF_NUR
 - Faculty:** FHS
 - Postcode:** FAC HLTH SOC SC
- Agent:** A text input field.
- Student number:** A text input field.
- Surname:** A text input field.
- Forenames:** A text input field.
- Title/Gender:** A text input field.
- Fee status:** A text input field.
- App category:** A text input field.
- Srce of interest 1:** A text input field.
- N.I. no.:** A text input field.
- email:** A text input field.
- Initials:** A text input field.
- Date of birth:** A date input field.
- Sponsor:** A text input field.
- Credit entry:** A text input field.
- External ref.:** A text input field.
- Postcode:** A text input field.
- Generate student application details:** A button with a green checkmark icon.
- Applicant details:** A text input field.

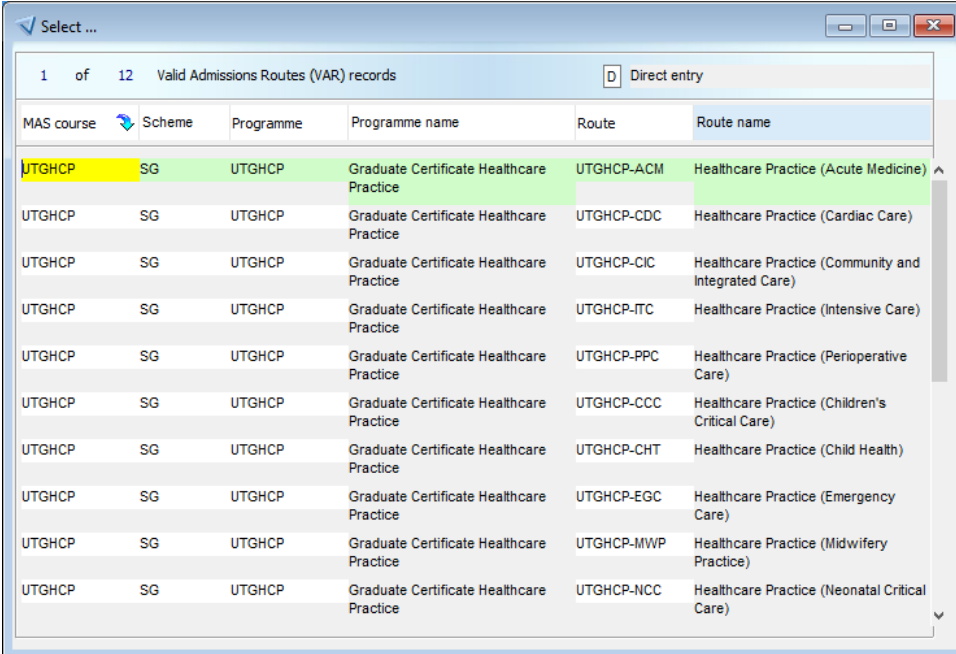
Figure 1. QAS screen as pre-populated for MAS Course UTMHCP

Stu Ap Status

- Leave as is and move to the next section

MAS Course (MCR) Details

- Enter the appropriate MAS code in the *MAS course* field and tab out
 - The fields in this section of the screen should pre-populate
- Check the Programme field
 - If this has not been pre-populated by entering the MAS code, re-enter the same code
- Check the Route field
 - 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
 - The Valid Admissions Routes (**VAR**) screen will appear



MAS course	Scheme	Programme	Programme name	Route	Route name
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-ACM	Healthcare Practice (Acute Medicine)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-CDC	Healthcare Practice (Cardiac Care)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-CIC	Healthcare Practice (Community and Integrated Care)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-ITC	Healthcare Practice (Intensive Care)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-PPC	Healthcare Practice (Perioperative Care)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-CCC	Healthcare Practice (Children's Critical Care)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-CHT	Healthcare Practice (Child Health)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-EGC	Healthcare Practice (Emergency Care)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-MWP	Healthcare Practice (Midwifery Practice)
UTGHCP	SG	UTGHCP	Graduate Certificate Healthcare Practice	UTGHCP-NCC	Healthcare Practice (Neonatal Critical Care)

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

- Select the appropriate route from the list by double clicking
- The selection screen will close and focus return to the **QAS** screen
- Check the *Block / Occ* field
 - 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
 - This should default to the current academic year
 - 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
 - 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
 - This will be populated once records are generated later in the process
- Populate the following fields as per the application:
 - *Surname*
 - *Forenames*
 - *Title*
 - *Gender*
 - *Date of birth*
 - *Email*
- Enter H in the *Fee Status* field (this stands for Home student)

[QAS] Quick Applicant Setup

JDANIELS St George's, University of London MS 08/Feb/2022
MAS01 Quick Applicant Setup (QAS) SRS_QDAD

Stu Ap status	A	APPLICANT	APF status	A	APPLICANT	Reset to Defaults
CAP status	A	APPLICANT				

1 of 1 MAS Course (MCR) records

MAS course	UTGHCP	Graduate Certificate Healthcare Practice				Clear Course
Block / Occ	1 / A		Attendance mode	PS	PART TIME STD	Add Course
Programme	UTGHCP	Graduate Certificate Healthcare Practice				
Route	UTGHCP-ACM	Healthcare Practice (Acute Medicine)				
Academic year	2021/22	2021/22	Department	JF_NUR	JF_NUR	
Entry Month	09	September Term 1	Faculty	FHS	FAC HLTH SOC SC	

Agent

Student number

Surname

Forenames

Title/Gender

Fee status

App category

Srce of interest 1

N.I. no.

email

Initials

Date of birth

Sponsor

Credit entry

Postcode

Generate student application details

Generate

Applicant details

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:

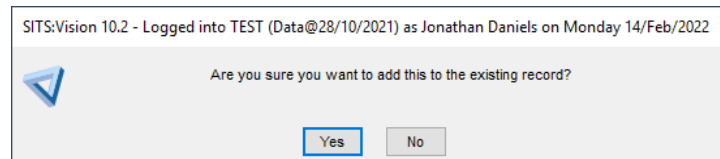


Figure 4. Generate application record for existing student confirmation dialogue

- 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

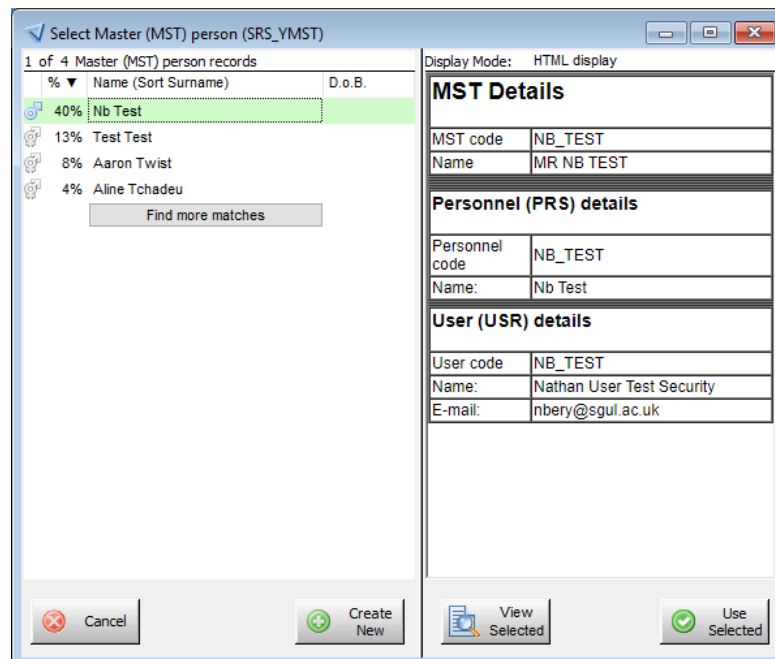


Figure 5. Select Master person screen showing potential duplicates and % match

- 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

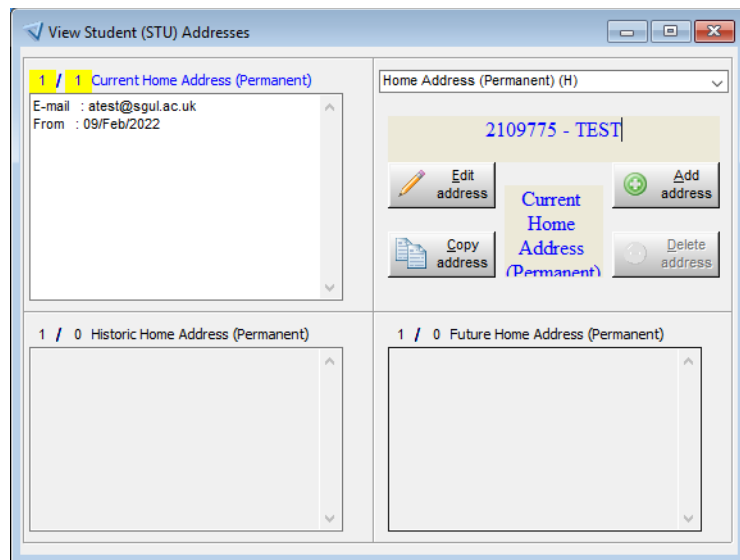


Figure 7. View Student Addresses screen for new student (no existing address information)

- 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
 - 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
 - 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.

Quick Student Enrolment - Student Report Fields (SRS_QESU_REP)

Student code: 2109775 A Test

Ethnic code:

Nationality:

Dual nationality:

Religion:

Country of Birth:

COD Code:

National Identity 1:

National Identity 2:

Welsh Speaker:

Spoken language:

Disability:

Disability Reg No.:

Dis allowance:

Learning Difficulty:

Advice on Disability: ☐

Highest Qual:

School:

Occupation background:

Parent/Guardian Occup.:

Inst attended:

Source of interest:

UCAS:Opted to receive emails: ☐

UCAS:Opted to receive SMS: ☐

UCAS:Opted not to receive marketing: ☐

Equality data

Additional Details

Cancel Apply

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

- Input directly on this screen
 - *Ethnic Code*
 - *Nationality*
 - *COD*
 - *Disability*
 - *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

Student Fields for Equality Legislation (SRS_QESU_REP1)

Student Code: 2109775 A Test

Religious belief: [dropdown]

Sexual orientation: [dropdown]

Gender identity: [dropdown]

Buttons: Cancel, Apply

Figure 10. Student Fields for Equality Legislation screen

- Input
 - *Religious belief*
 - *Sexual orientation*
 - *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

Student Additional Details (SRS_STUA)

JDANIELS St George's, University of London MS 11/Feb/2022
SRS01 Student Additional Details (STUA) SRS_STUA

1 of 0 Student Additional Details (STUA) Records

Student Code: 2109775

Disability options:

- Student has known disability: [dropdown]
- Disability (Vision problem): [dropdown]
- Disability (Medical problem): [dropdown]
- Disability (Social/communication impairment): [dropdown]
- Personal Care Support: [dropdown]
- Disability (Specific learning): [dropdown]
- Disability (Hearing problem): [dropdown]
- Disability (Learning problem): [dropdown]
- Disability (Mobility problem): [dropdown]
- Disability (Mental health difficulties): [dropdown]
- Disability (Other problem): [dropdown]

Other fields:

- Surname at 16: [text box]
- Gender expression of student: [dropdown]
- Carer: [dropdown]
- Carer (HESA): [dropdown]
- Care Leaver: [dropdown]
- Socio-Economic Classification: [dropdown]
- Standard Occupational Classification: [dropdown]
- ORCID identifier of student: [text box]
- Educational Maintenance Allowance (EMA): [dropdown]
- Associate Student Status: [dropdown]
- Award assessment category: [dropdown]
- ESF target group: [dropdown]
- Previous Merger Institution: [text box]
- Year finished secondary education: [text box]
- Learner reference in previous year: [text box]

Bottom options:

- No Known Disability (FES 2013/14): [dropdown]
- Multiple disabilities (FES 2013/14): [dropdown]

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. 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 E
- 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

The screenshot shows the ACD screen with the following populated fields:

- Applicant:** 2109775, TEST, A, Seq 01/01, D.O.B. 25/Dec/1982
- App Status:** A, APPLICANT
- Qual Status:** (empty)
- RBD Date:** (empty)
- Stage:** 1 (selected), 2, 3
- Decision/Date:** (empty)
- Response/Date:** (empty)
- Reply by Date:** (empty)
- Offer:** (empty)
- Offer Note:** (empty)
- Notes:** (empty)
- Non-ac Met:** (empty)
- Total Points:** (empty)
- Dec/Rsp:** UF
- UCAS Prog ID:** (empty)
- Scheme:** SG
- Entry Year:** 2021/2
- Month code:** 09
- Attend Mode:** PS
- PART TIME STD:** (empty)
- SCJ code:** (empty)
- SRS Course:** UTGHCP
- Block/ Occ:** 1 / A
- Progr:** UTGHCP
- GRAD CERT HCP:** (empty)
- Route:** UTGHCP-ACM
- Healthcare Practice (Acute Med):** (empty)
- Interview Date:** (empty)
- Interview Time:** (empty)
- Interview Sts:** N
- Interview Reply:** (empty)
- Audition code:** (empty)
- Study Mode:** (empty)
- Course targets:**
 - Other CAP fields:** DSC code: 1UAF, UO ACPTD FIRM
 - Offer text:** (empty)
 - Other course applications(0):** (empty)
 - Clearance Checks(1):** (empty)
 - Apply decision values:** Fee amount: £, Fee Status: (empty), Fee Status2: (empty), Reply by date: (empty), Submitted on: 09/Feb/2022
 - Additional files:** (empty)

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

- Enter QV in the *Qual Status* field
- Enter U in *Decision* field under Stage 1
- Enter F 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 populate 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 student number 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

5. 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 student number in the *Student* field
- Retrieve the record

The screenshot shows the '[STU] Full Student Details' window for St George's, University of London MS. The window title is '[STU] Full Student Details' and the user is JDANIELS SRS01. The date is 11/Feb/2022 and the record is SRS_STU_B. The window displays a list of 1 of 1 Student (STU) records. The student's details are as follows:

Field	Value
Student	2109775
Title	M
Known As	A
Surname	TEST
Letters	
D.o.B.	25/Dec/1982 39
Previous name	
Gender	M
Forenames	A
Initials	A
Official name	A Test
Edit name?	<input type="checkbox"/>

Below the student details, there are several sections for additional information:

- Reference ID**: Start date, End date, Batch Number, User defined 1, User defined 2, Research council, Another no., TOEFL Ref Number, HEMIS student no.
- Personal ID**: GMC reg., Scottish cand., Vocational qual, Stu. Union No., Library No., Unique Learner
- HESA ID**: Stu support no., External Ref., Teacher T. Ref, Nurse Ref, NI Number, Dpt of Health reg
- Info msg alert**: App status (A), Stu status, Ex. status, Home/Oseas, Fee status (H), Fee reason, Marital stat, Acad drnce (P), Fin drnce, Highest qual (HUK), Inst attended, Last School, Year last attended: School, Institute, Last Ed Estab, Site, Building, Room, Analysis 1, Ambassador, Police Registration, Analysis 5
- APPLICANT**: Publicity flag, Comm. in Welsh, Method of comm., Location of Photo
- PROVISIONAL**: Term-time acc., Employer, Sponsor, Unemp. duration, Unemployed, Occ backgrnd, LEA, Social class, Soc.Eco.Class, UK resident, Study permit, UK entry date, Report to UKVI, Next of kin, Relation, Car Reg., No. Dependants, Int Tel No., Institutional email
- Home Address**: Contact Address, Bank details

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

- Add the appropriate codes to the *Employer & Sponsor* fields
 - 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

6. 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 student number followed by wildcard goldstar in the *SPR Code* field
- Retrieve the record

The screenshot shows the [SPR] Student Programme Route window for student JDANIELS CAM01 at St George's, University of London MS. The window is titled 'Student Programme Route (SPR)' and shows the date 11/Feb/2022. The student's SPR Code is 2109775/1, and the Sort Name is TEST A. The Batch is ATR, and the STU Code is 2109775. The student's Surname is TEST, and the Forenames are A. The Date of Birth is 25/Dec/1982. The Study Details section shows the Status as REGISTERED, Level as UG YR 3, Mode Attend as PART TIME STD, Programme as UTGHCP, and Route as Healthcare Practice (Acute Medicine). The Award Details section shows the Year as 2022/3, Intended Award as GCHCP, and Programme as Graduate Certificate Healthcare Practice. The Route is UTGHCP-ACM. The screen also includes fields for Tutor 1, Tutor 2, Department, Faculty, Location, Exam Centre, Placem't Coh't, and Route switched.

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

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

St George's Students on Open Spaces Modules

- 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**

7. 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
 - 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

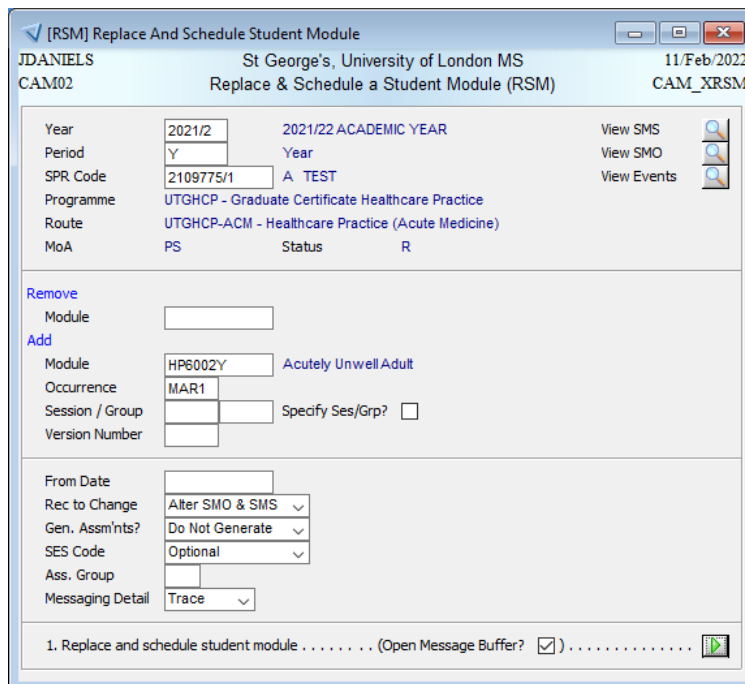


Figure 16. Example of completed RSM screen

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

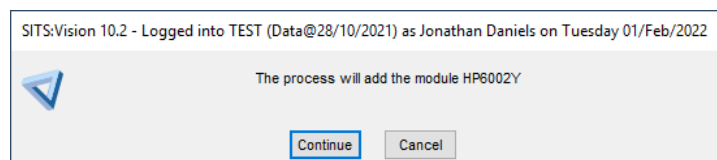


Figure 17. Module scheduling confirmation dialogue

- 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

8. Sending Invitation to Enrol Email

All 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 ENR_NWPED_E1 in the *letter code* field for professional education or alternative code if you have a course specific invitation.
- Click on the *Send email* button.

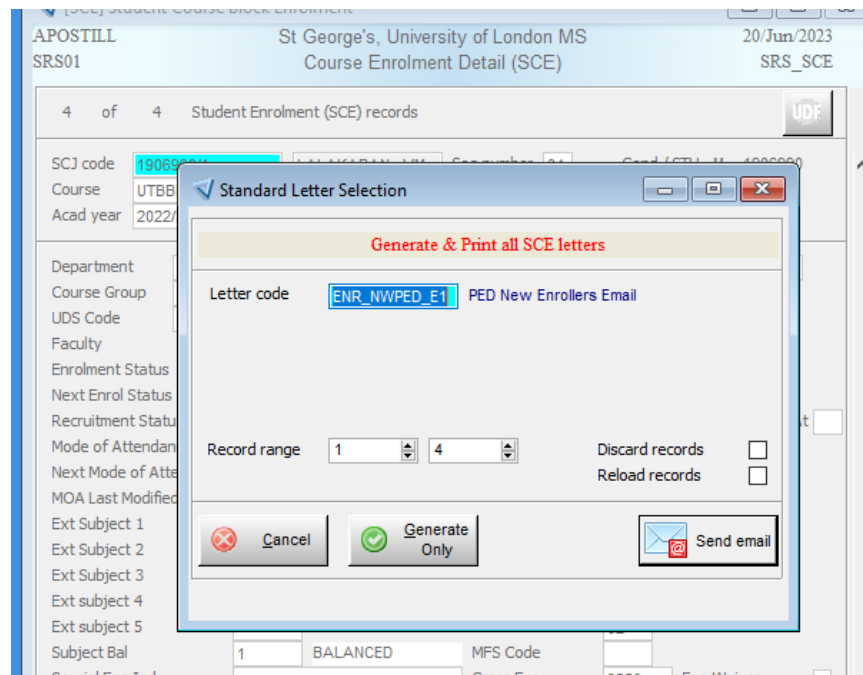


Figure 18. Example of enrolment invitation process box

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