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# Checklist for managing implications of change in student status

Supporting documentation is in bold, with links to all documentation is at the end of the checklist.

Note: for all International T4 students, please seek advice from the Student Immigration Team of any change in student status

|  |  |  | **Impact on…** |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Change in Circumstances** | **Campus Solutions** | **External Reporting Requirements** | **Funding** | **eProg** | **Student Communications** | **Other** |
| **Interruption** (within grant period)What you need to know | Update Student Program and Registration details  | Inform external partners / stakeholders of the student taking the interruption e.g. external institution if the student is jointly supervised, industrial placement, RCUK via JeS, International Sponsor and UKVI via the Student Immigration Team if Tier 4  | Action is only required where the University manages the student funding i.e. Internal Award where we set up the fees and stipend.  | Interruptions are automatically fed through from Campus Solutions The eProg system pulls through that a student has interrupted (via their LOA status in CS) and once a return date has been entered into Campus Solutions – all milestones and form deadlines will be automatically advanced by the appropriate interruption period.NB: If a milestone/form deadline has already been manually edited the interruption will not be applied and the deadline dates will need to be manually adjusted.NB: Only system administrators can edit expectation and attendance deadlines. | Student notified as to any funding, registration and payment of fees implications resulting from LOA in their formal permissions letter from School/Faculty.T4 Students should be advised to contact the Student Immigration Team to discuss the implications for their visa.  | If the student is Tier 4 then any interruption over 60 days must be reported to the UKVI. When an interruption of over 60 days is applied to the student record, the Student Immigration Team will notify the student that they must leave the UK as they are not currently studying. |
| How to  | Refer to **RSM Guide** ‘Interrupts during a year’ p19Or‘Interrupts crossing terms’ p20Refer to **RSM Guide** p22 ‘Stipends during interruptions’  | Notify relevant partner / Graduate School; request Industry Supervisory team notifies the industrial placement. If the PGR Student is an International Student inform the Student Immigration Team visa@manchester.ac.uk, <http://www.saa.manchester.ac.uk/student-immigration/> If RCUK ensure changes are reflected in JeS by contacting your Faculty / School JeS administrator as soon as possible after effective change is approved see **PGR Funding: Guide to funding eligibility and Terms and Conditions** | Check policy and eligibility for payment during interruption with funder**PGR Funding: Guide to funding eligibility and Terms and Conditions**See **Policy on Circumstances Leading to Changes to Postgraduate Research Student** from p7 If eligible ensure payments are continued on CS during interruption **Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students** **Tuition Fees: Interruptions and Withdrawals** | To manage an interruption manually on eProg see page 66 in the **eProg for Administrators Guide 1: Overview and set up for Progression**.  |  |  |
| **Interruption** (resulting in student expected end date going beyond the grant end date)What you need to know | As above | As aboveCheck if the interruption requires funder approval.Inform the funder and seek approval for no cost or cost extension as appropriate. | As aboveCheck if the student is eligible for funding, if so identify who can / should fund the extension.If eligible ensure payment through to the revised end date. Check **Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students**Contact Finance to arrange an extension of the account activity code.  |  | Student notified as to any funding, registration and payment of fees implications resulting from LOA in their formal permissions letter from School/Faculty. | If the student is Tier 4 then any interruption over 60 days must be reported to the UKVI. When an interruption of over 60 days is applied to the student record, the Student Immigration Team will notify the student that they must leave the UK as they are not currently studying. |
| How to | As above | As above |  |  |  |  |
| **Interruption** (when the interruption is retrospective)What you need to know | As Interruption (within grant period) | As Interruption (within grant period)E-mail the Student Immigration Team (visa@manchester.ac.uk) to alert the team that a retrospective interruption has been applied to the student record. You must include a reason for the interruption being applied retrospectively, as justification to the UKVI for the delay in reporting that the student is not currently studying.  | As Interruption (within grant period)Check that the period of interruption is not greater than any eligible payment period under University policy Confirm if there is a need to reclaim any overpayment based on University / funder policy.University policy on change in student circumstances from p7 | Note that previously completed milestones may jump forward but with completed dates. | Student notified as to any funding, registration and payment of fees implications resulting from LOA in their formal permissions letter from School/Faculty. | If the student is Tier 4 then any interruption over 60 days must be reported to the UKVI. When an interruption of over 60 days is applied to the student record, the Student Immigration Team will notify the student that they must leave the UK as they are not currently studying. |
| How to | As Interruption (within grant period) | As aboveIf the student is Tier 4 then any interruption over 60 days must be reported to the UKVI. When an interruption of over 60 days is applied to the student record, the Student Immigration Team will notify the student that they must leave the UK as they are not currently studying. Some funders may not permit retrospective interruptions but may permit prospective (unpaid extension instead) | Check **Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students**If there has been an overpayment, see **Reclaiming stipend payments from PGR students** Update any local permissions logs.  |  |  |  |
| **Extensions to programme**What you need to know | Update to Student Program, Registration and possibly Term Activation. | Inform external partners / stakeholders of the student requesting an extension e.g. external institution if the student is jointly supervised, industrial placement, RCUK via JeS, International Sponsor and Student Immigration Team (if Tier 4).If the student is industrially funded contact Contracts to review if there are any contract implications.  | Action is only required where the University manages the student funding i.e. Internal Award where we set up the fees and stipend. | The expected end date should update automatically in eProg (under the Thesis Submission Deadline) once the student expected end date has been changed in CS.  | Student notified as to any funding, registration and payment of fees implications resulting from LOA in their formal permissions letter from School/Faculty. |  |
| How to | Refer to **RSM Guide** ‘Extensions’ p22, ‘Extension to PGDR Programme with Fee (EXTF)’ p23, ‘Extension to PGDR Programme with no Fee (EXTN)’ p23, ‘Extension to PGDR Submission Pending Period (EXTS)’ p24 | Notify relevant partner / Graduate School; request Industry Supervisory notifies the industrial placement. If the PGR Student is an International Student information the Student Immigration Team, visa@manchester.ac.uk, <http://www.saa.manchester.ac.uk/student-immigration/>If RCUK ensure changes are reflected in JeS as soon as possible after the change has been agreed, see **Contacts for Faculty / School JeS administrators**Contact the Contracts Office <http://www.staffnet.manchester.ac.uk/services/rbess/contracts/>  | If eligible ensure payments are continued check **Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students** Confirm if extension with fee or extension NIL fee see **Tuition Fees: Interruptions and Withdrawals**  | Automatic system changesConsider if additional progress milestones are needed  |  |  |
| **Student discontinues (student decision) / Student withdraws (UoM decision)**What you need to know | Update Student Program Plan and possibly Term Activation. Ensure nil payments in CS and record reason for student discontinuing / withdrawing. | If a student is readmitted (for any reason) E-mail the Student Immigration Team (visa@manchester.ac.uk) to alert the team that the student’s record has been reactivated. This is so the student can be unreported (if possible) in order to prevent the visa from being curtailed.Also inform external partners / stakeholders if a student is readmitted.  | UoM colleagues managing funding need to be informed immediately if a student discontinuous / withdraws to Arrange adjustment to the DTP account and ensure our reporting to funders is correct. This enables* money to be reallocated to other student’s
* the University to maximise grants
* the University to meet the Funder terms and conditions ensuring continued funding
 | eProg student record will automatically move under Student Index Archive once the student’s status on CS is recorded as ‘discontinued’. https://app.manchester.ac.uk/eprog/student/archive.aspx | Confirm withdrawal and outline any outstanding issues | If the student is Tier 4 then any withdrawal from their course of study (either student decision or UoM decision) must be reported to the UKVI . When a withdrawal is applied to the student record, the Student Immigration Team will notify the student that they must leave the UK. |
| How to | Refer to **SRM Guide** ‘Discontinue’ p54, ‘Administrative Withdrawal’ p57Refer to **RSM Guide** ‘Research Student Action Reasons’ p29, ‘Table of Action Reasons’ p29, ‘Use of Action Reasons Flowchart’ p31**Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students**  | If RCUK ensure changes are reflected in JeS as soon as possible after the change has been agreed see **Contacts for Faculty / School JeS administrators**  | If the student is RCUK funded contact the Graduate Education Manager see **PGR Funding: Guide to funding eligibility and Terms and Conditions.** **Graduate Education Contacts**.For other funders – confirm the funder with the Primary Supervisor and discuss the implications with Graduate Education. Check if the student is liable to repay any stipend payments, if so arrange repayment see **Reclaiming stipend payments from PGR students**Notify fees team of the student discontinuing / withdrawing and the effective date on CS, they will arrange any credit / reimbursement of fees tuitionfees@manchester.ac.uk | Completed milestones of discontinued students can be view under the eProg Student Index Archive. The archive is only visible to certain eProg roles.https://app.manchester.ac.uk/eprog/student/archive.aspx |  |  |
| **Change in MoA (FT -> PT or PT -> FT)** What you need to know | Update Student Program Plan, Registration details, Term Activation, Student Supervisor, possibly CAS.Manually alter disbursement / stipend. | As aboveIf the PGR Student is an International Student confirm with the Student Immigration Team that their visa status is compatible without the proposed change in MoA (NB Tier 4 students are never permitted to study part-time), visa@manchester.ac.uk, <http://www.saa.manchester.ac.uk/student-immigration/> | Note: some funders e.g. CDTs / EPSRC do not allow a student to change MoA during the first year. Check eligibility of change in MoA with funder and discuss with Graduate Education / Primary Supervisor | If a student changes their mode of study, and changes the programme/plan they are registered on, the change will be managed automatically in eProg, providing the change has been made in Campus Solutions. Campus Solutions will need manual adjustment refer to **Student Records Maintenance. A Complete Guide** from p32  | Ensure clear communication to student of effective date of change for MoA and impact on payments. |  |
| How to | Refer to **SRM Guide** ‘Programme Changes’ p12, ‘Scenario D – Change of Programme – Different Mode of Attendance’ p32.Refer to **RSM Guide** ‘Updating Supervisors / Advisor Details following a Programme Change’ p11, ‘CAS / Visa Implications’ p13.**Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students**  | As above | **Graduate Education and CDT Contacts.** | If a change in a student’s mode of attendance has not been reflected in eProg this will need to be manually amended in eProg. See p66 in the **eProg for Administrators Guide 1: Overview and set up for Progression**.  |  |  |
| **Change of institution (outgoing student)** What you need to know | Update Student Program Plan and possibly Term Activation. Ensure nil payments in CS and record reason for student discontinuing. If the student is a CDT student their status may need to be set up as a visiting student (***this only applies to some not all CDT funded students***). If in doubt contact the CDT Administrator <http://www.manchester.ac.uk/study/postgraduate-research/why-manchester/doctoral-college/doctoral-training/> | As ‘Student discontinues’ | If RCUK funded contact the grant holder / CDT Administration / Graduate Education Administration to agree the implications of a student transferring out. Usually the grant stays with the University. If Charity / Industry funded the funding usually stays with the student, check with the funder / Graduate Education Manager or equivalent. For other funding e.g. endowments discuss with Graduate Education Manager.Contact the inheriting institution to ensure there is effective handover both academically and financially. | As ‘Student discontinues’ |  | Check if the student is eligible to transfer, academically and financially. If they have been registered >50% of the programme length they cannot transfer out see **Ordinances and Regulations: Degree of Doctor of Philosophy** (PhD) p6  If No the student remains a University of Manchester student. If Yes the supervisory team needs to identify a replacement PI which requires agreement by the Faculty Graduate Education Manager.  |
| How to it | Refer to **SRM Guide** ‘Discontinue’ p54, ‘Administrative Withdrawal’ p57Refer to **RSM Guide** ‘Research Student Action Reasons’ p29, ‘Table of Action Reasons’ p29, ‘Use of Action Reasons Flowchart’ p31**Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students** | As ‘Student discontinues’Arrange a transfer of JeS records to the reporting institution as agreed. | **Graduate Education and CDT Contacts.**  |  |  |  |
| **Change of institution (incoming student)** What you need to know | The student needs to formally apply to a programme and be assigned on the relevant Programme / Plan. The programme end date will need amending. Implement on CS by setting up an internal award (fee) and stipend. Ensure to check that the amounts are appropriate.  | If the PGR student is international and the course has an ATAS JACS code then they must obtain ATAS clearance before starting the course. If the student is Tier 4, then the new visa application using our CAS must be made before starting the course. We recommend that transferring Tier 4 students are referred to the Visa Check and Send service run by the Student Immigration Team to assist in making the visa application.Clarify with the original institution with reference to reporting requirements.  | Inform your Graduate Education Manager and work with them to identify the implications. Arrange the setup of an account code / task in an existing account code with the appropriate School / Faculty Finance Officer. Ensure the account is set up in advance of the student transfer. Contact the original institution to ensure effective academic and financial handover. Ensure you work with your Finance Officer, Graduate Education Manager and the original institution to decide when / where to transfer funding or if the funding will remain with the original institution.  | The student needs to be registered on a programme/ plan within CS before they will appear in eProg. If the student is registered on a new programme/plan this needs to be added to a pathway. Note need to create individual pathway to fit their progression timeline or manually assign to a matching timeline | Student notified as to funding arrangements/set-up alongside formal ‘admissions/offer’ letter from School/Faculty.  | Check if the student is eligible to transfer into the University of Manchester, academically and financially. If >50% of the programme has been completed the University would usually not allow a transfer. If there are not eligible there is no further action.See **Ordinances and Regulations:** **Degree of Doctor of Philosophy (PhD)** from p6  |
| How to | **PG & Direct Entry Campus Solutions Training Guide** **Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students** **Tuition Fees: Interruptions and Withdrawals** | If RCUK ensure changes are reflected in JeS as soon as possible after the change has been agreed by contacting your Faculty / School JeS administrator see **PGR Funding: Guide to funding eligibility and Terms and Conditions** (after agreeing handover with original institution). | **Oracle Activity Coding of PGR Studentship Process Guidance** **Graduate Education and CDT Contacts.**  | See page 24 in the **eProg for Administrators Guide 1: Overview and set up for Progression**. |  | Check with the Graduate Education Manager see **Graduate Education and CDT Contacts.** |
| **Change of Discipline Area**What you need to know | Update Student Program Plan, Student Supervisor possibly Registration details, Term Activation, and CAS. | If an International Student the change in programme could alter the associated JACS code. Codes can be checked via CS, for additional support contact the Planning and Support Office. Ensure other partners / stakeholders are informed as appropriate. | A change of Faculty or School could change the ownership of the funding administration.Notify the appropriate Graduate School / Faculty Officer to ensure there is effective hand over of the funding administration for the student.  | If the student is changing to a programme which already exists in CS then the changes will be made automatically in eProg. If the programme is new then the programme/plan this needs to be added to a pathway in order for milestones to be added to the students eProg record. |  |  |
| How to | Refer to **SRM Guide** ‘Programme Changes’ p12, ‘Scenario D – Change of Programme – Different Mode of Attendance’ p32.Refer to **RSM Guide** ‘Updating Supervisors / Advisor Details following a Programme Change’ p11, ‘CAS / Visa Implications’ p13 | If RCUK ensure changes are reflected in JeS, as soon as possible after the change hs been agreed , by contacting your Faculty / School JeS administrator see **PGR Funding: Guide to funding eligibility and Terms and Conditions**. Check the JACS code of the new programme with the Planning and Support Office, <http://www.campus.manchester.ac.uk/planningsupportoffice/index.html>If the PGR student is international and the new programme has a JACS code that requires ATAS clearance, then you must check that the student has obtained this clearance before starting the new programme. This is for any visa type not just for Tier 4If the PGR Student is a International Student inform the Student Immigration Team, visa@manchester.ac.uk, <http://www.saa.manchester.ac.uk/student-immigration/> if there are any visa implications. |  | See page 24 in the **eProg for Administrators Guide 1: Overview and set up for Progression**. |  |  |
| **Progression** What you need to know | Update Term Activation.Implement set up of fees and stipend following the completion of the end of year milestones.  | Update funders as appropriate e.g. industrial funders.  | Action is required to ensure payments continue | Students eProg milestones will be highlighted green if completed |  |  |
| How to | Refer to **RSM Guide** ‘Progression’ p20 and p21**Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students** If progression is delayed see Interruptions or Extensions to Programme above and **Tuition Fees: Interruptions and Withdrawals** | If RCUK ensure changes are reflected in JeS as soon as possible after the change has been agreed by contacting your Faculty / School JeS administrator **see PGR Funding: Guide to funding eligibility and Terms and Conditions** | Update internal fee and stipend | See page 22 in the **eProg for Administrators Guide 1: Overview and set up for Progression**. |  |  |

## Documentation location

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| **Document Title** | **Location** |
| Campus Solutions Financial Award Processing: Guidelines and Good Practice for PGR Students | <http://documents.manchester.ac.uk/DocuInfo.aspx?DocID=29311> |
| Contacts for Faculty / School JeS administrators | <http://www.staffnet.manchester.ac.uk/services/rbess/graduate/contacts/> |
| eProg for Administrators Guide 1: Overview and set up for Progression. | <http://documents.manchester.ac.uk/DocuInfo.aspx?DocID=15726>  |
| Graduate Education and CDT Contacts | <http://www.staffnet.manchester.ac.uk/services/rbess/graduate/contacts/> |
| Oracle Activity Coding of PGR Studentship Process Guidance | <http://documents.manchester.ac.uk/DocuInfo.aspx?DocID=29378>  |
| Ordinances and Regulations: Degree of Doctor of Philosophy (PhD) | <http://documents.manchester.ac.uk/display.aspx?DocID=20673>  |
| PG & Direct Entry Campus Solutions Training Guide | <http://www.saa.manchester.ac.uk/admissions/how-to-process-an-application/pg-and-direct-admissions/>  |
| PGR Funding: Guide to funding eligibility and Terms and Conditions | <http://documents.manchester.ac.uk/admin/EditDoc1.aspx?DocID=29377>  |
| Policy on Circumstances Leading to Changes to Postgraduate Research Student | <http://documents.manchester.ac.uk/display.aspx?DocID=8162>  |
| Reclaiming stipend payments from PGR students | In development |
| Research Student Management Guide (RSM Guide) | <http://www.campus.manchester.ac.uk/planningsupportoffice/SSO/ssusersguide/pdf/Research%20Administrators%20CS%20User%20Guide%20Version%203.2.pdf>  |
| Student Records Maintenance. A Complete Guide (SRM Guide) | <http://documents.manchester.ac.uk/DocuInfo.aspx?DocID=27102>  |
| Tuition Fees: Interruptions and Withdrawals | <http://www.saa.manchester.ac.uk/student-finance/tuition-fees/withdrawals-and-interruptions/>  |

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