bsa | GROUP LEGAL SERVICES LTD

CAS Export Guide

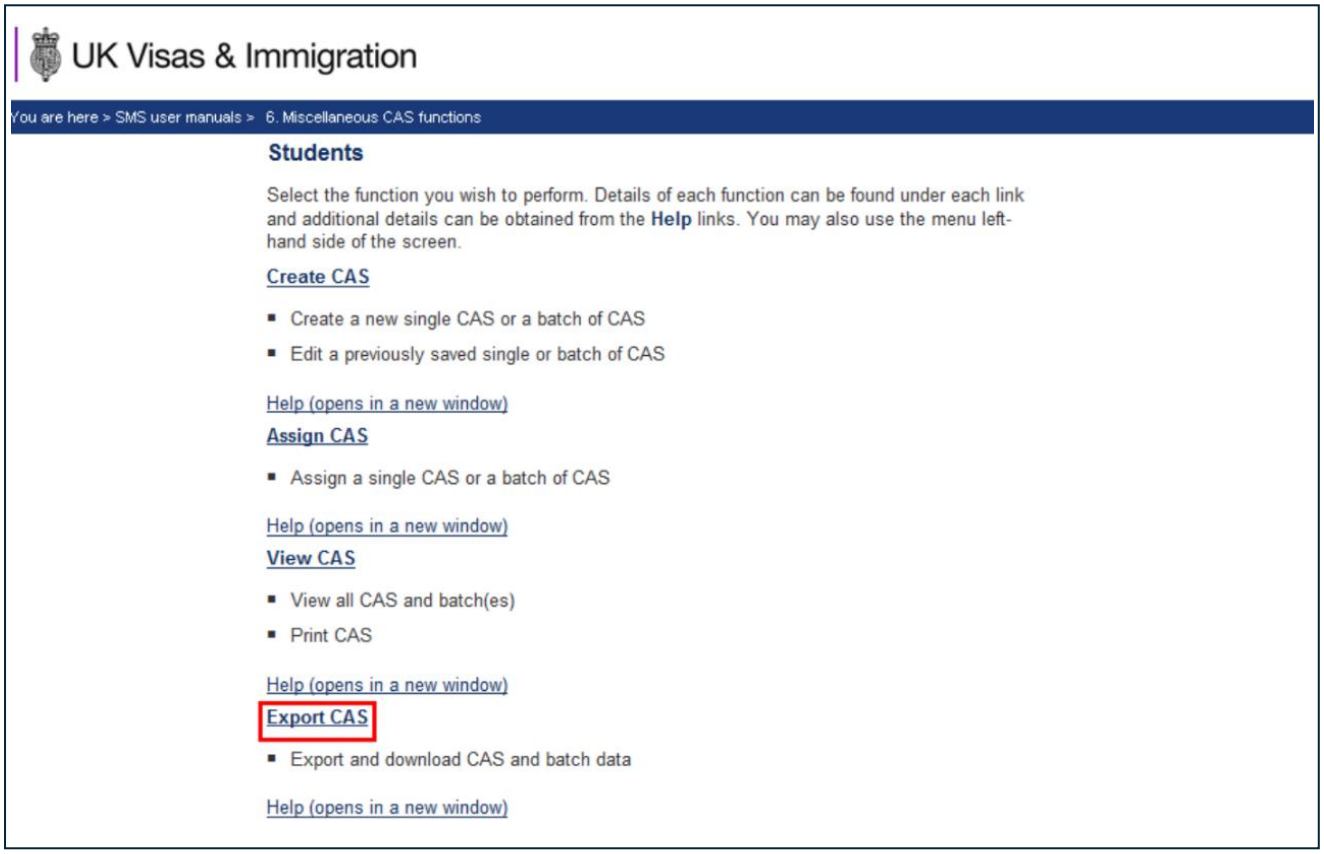
LAST UPDATED: AUGUST 2024

Exporting Multiple CAS Records from the Sponsorship Management System (SMS)

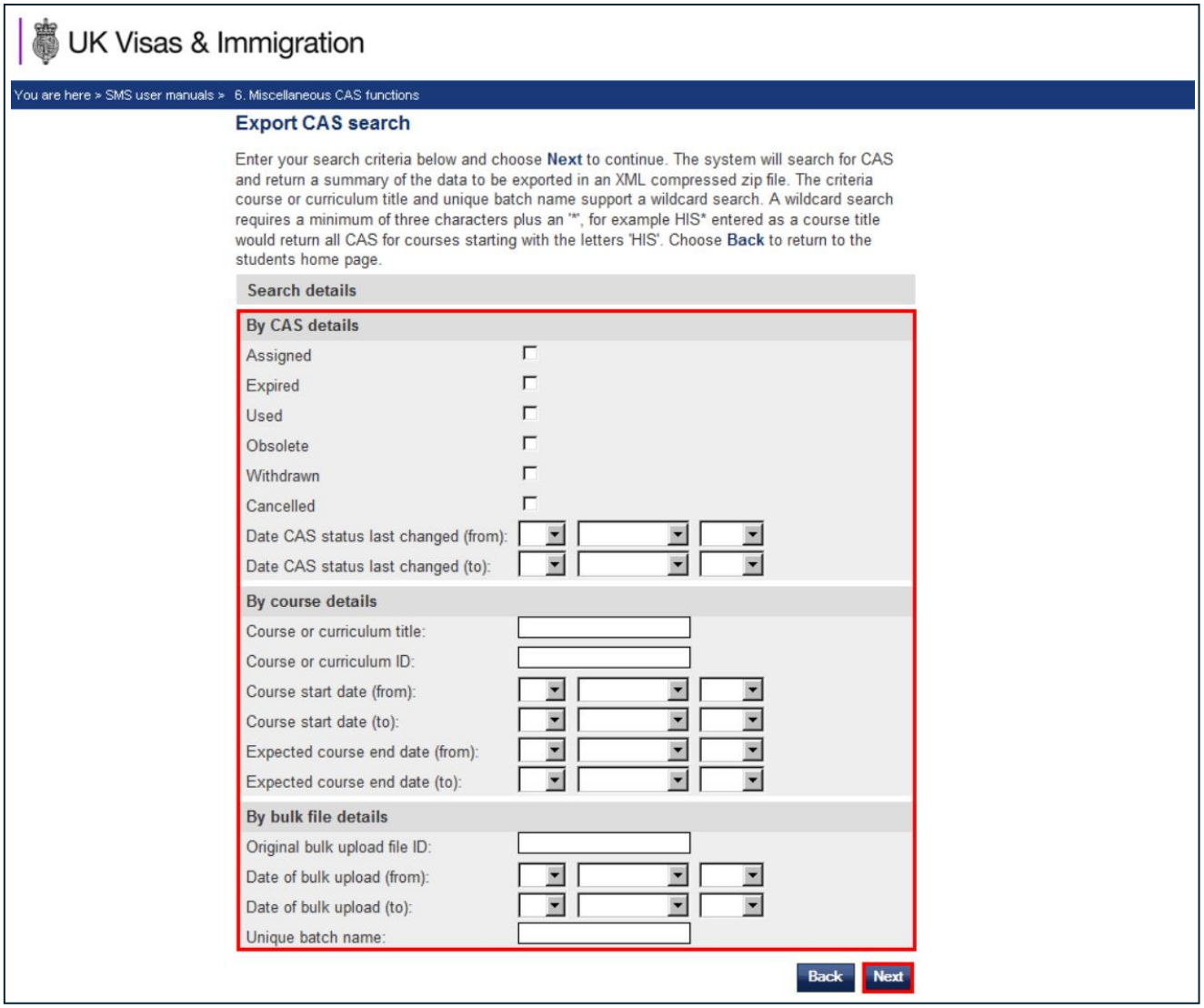
Sponsor schools are advised to cross-reference their own CAS records against UKVI SMS records. Follow the steps below to export multiple CAS records from the SMS to an .XML file and convert to an Excel file. This function is useful if you have a large number of CAS records you would like to review.

Note: The export function on the SMS will not include CAS records with a status of "READY TO GO" or "WORK IN PROGRESS".

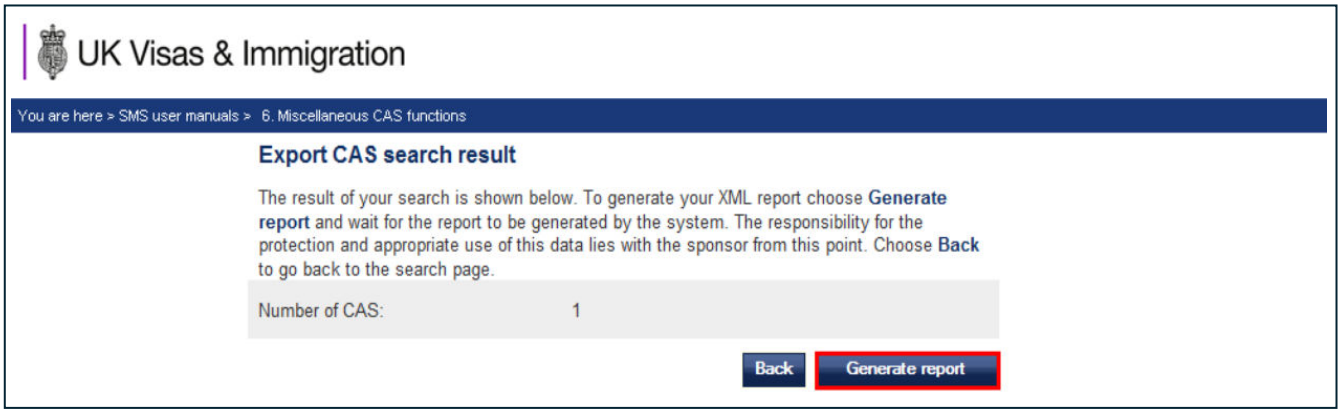
Step 1: From the **Student** screen on the SMS, select **Export CAS**.



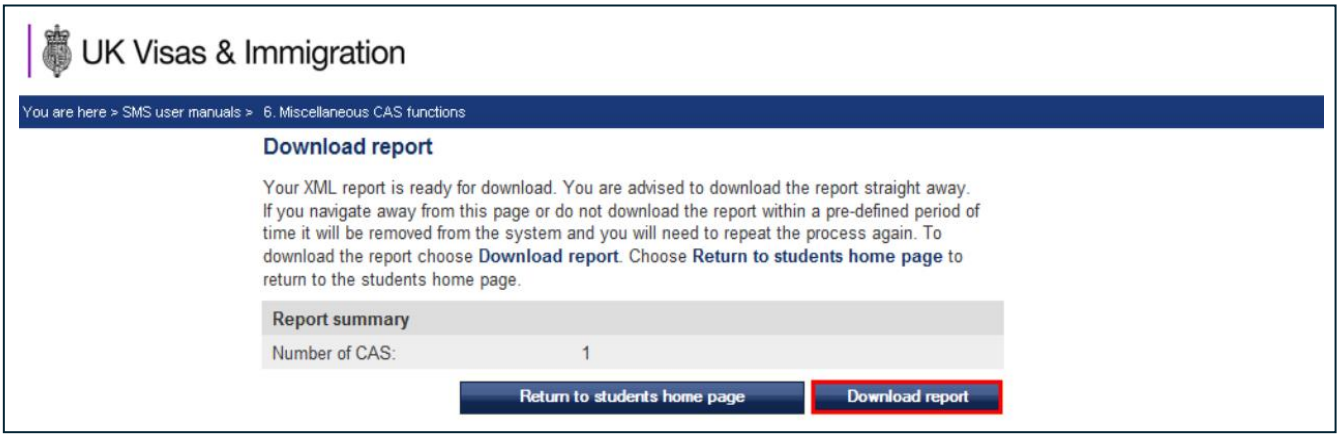
Step 2: From the **Export CAS search** screen, select the information you would like your report to contain, then select **Next**. (To capture and cross-reference all CAS records to date, it is recommended that sponsors leave all fields blank. This will return a list of all CAS assigned to date, which sponsors should carefully review, going back as far as possible).



Step 3: From the **Export CAS search result** screen select **Generate report**.

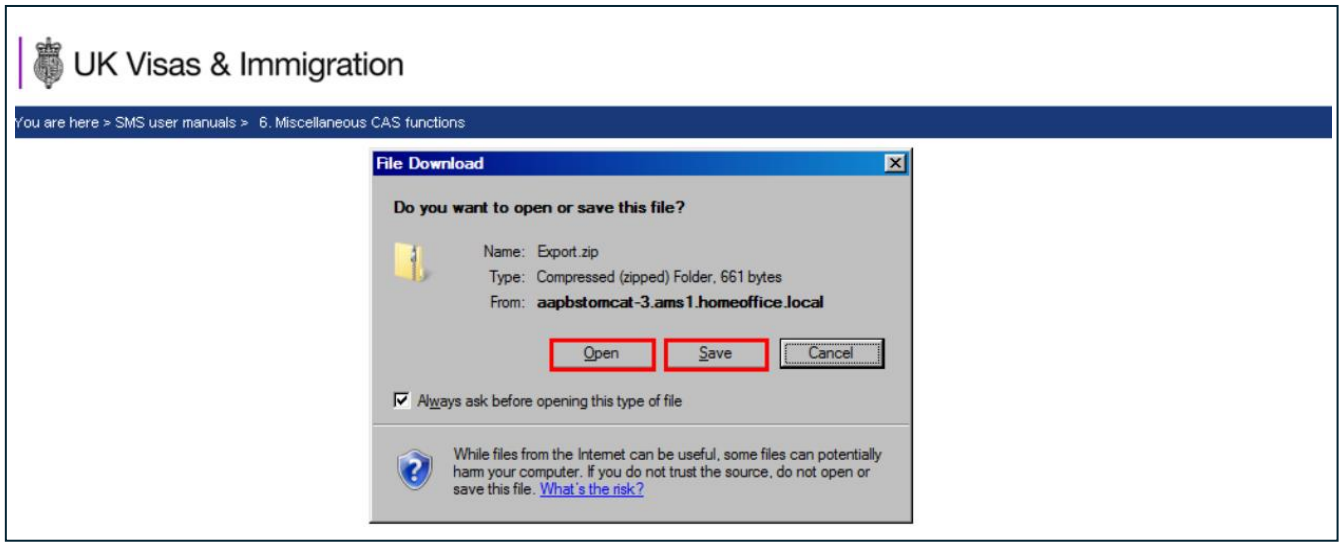


Step 4: Your report has now been generated and is ready for download. Select **Download report (no grad. notifications)**.

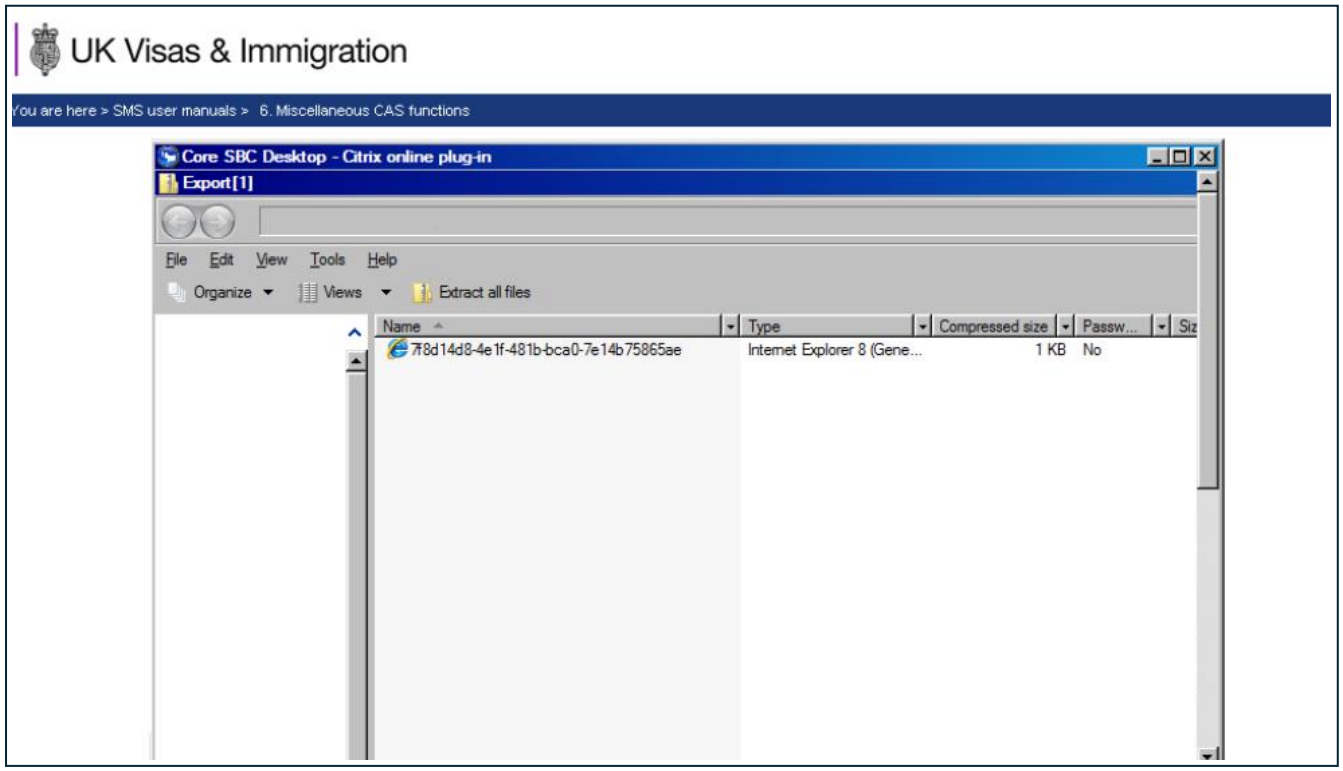


*** Please note the options shown above have since been updated on the SMS. Select the option that does not include grad notifications. ***

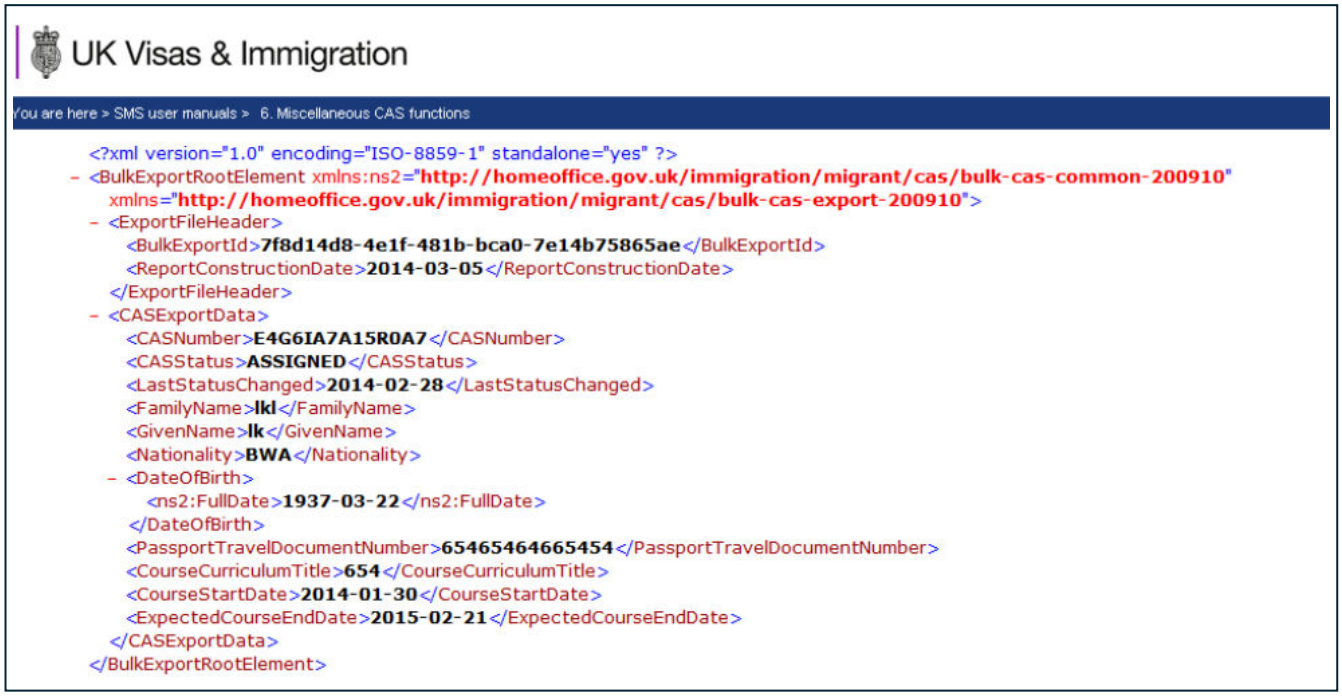
Step 5: From the **File Download** box, you are given the option to open or save the file. It is recommended that you save the file to your local machine or network. Select **Save**. You may change the file location or filename if you wish. If you wish to view the file, select **Open**.



Step 6: The file will be available to select from your file explorer window. Click on the file to open it, the file should automatically open in your internet browser.



Step 7: The file is now open in XML format and the details of each CAS can be seen.



To read and edit the downloaded report effectively, we recommend converting the exported XML file to an Excel file by:

1. Opening Excel
2. On the left-hand side of Excel, select 'Open' (folder icon) and open the downloaded / saved XML file
3. Excel will prompt on how to open the file - select 'as a read-only workbook'
4. You will need to rename and save the file again when it opens in Excel, which will enable you to edit / filter the data. It is recommended that sponsors filter the data by course end date and work backwards as far as possible to cross-reference their own CAS records against UKVI SMS records. Sponsors should ensure that all CAS statuses are accurate, and any reporting is complete for all current and historic students.

Should you require further support, please contact the BSA Group Legal team on legal@bsagroup.org.uk or +44 (0)207 798 1583.

bsa | GROUP LEGAL SERVICES LTD