How to Transfer Applicants to a Different Intake/Admission Group

Applicable to SIMS .net version

7.108
 onwards.

Permissions required

You will need to be a member of the *Admissions Officer* user group in System Manager to transfer applicants to a different intake/admission group.

Please see your System Administrator/Manager if you are not sure whether you have the required permissions.

Introduction

When the details of an applicant are initially recorded, either manually entered or imported via ADT, ATF or CTF, the applicant will be associated with a particular intake and admission group. These groups define the date of admission and year group that the application is for.
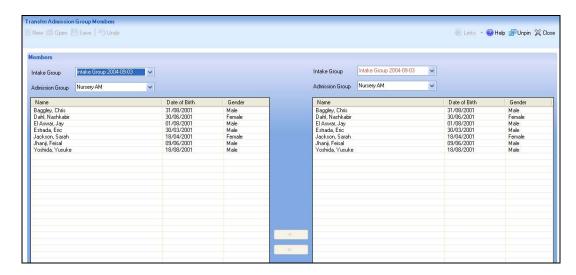
During the admissions process, you may need to transfer the applicant to a different intake and/or admission group. This could be required for example, because an applicant has been recorded in the wrong admission group or places become available in an earlier intake.

This help sheet describes how to transfer one or more applicants from one intake group to another. It is also possible to transfer an applicant to another group by selecting a different intake group in the **Registration** panel of the **Application** page (via **Focus | Admission | Application**).

Transferring Applicants

1. Select **Routines | Admission | Admission Groups | Transfer Applications** to display the **Transfer Admission Group Members** page.
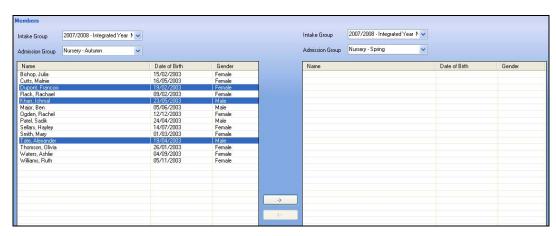
By default, the page displays the first available intake group together with any applicants within that group.

2. Select the intake group from which to transfer applicants from the left-hand **Intake Group** drop-down list. Any admission groups within the chosen intake group can then be selected from the **Admission Group** drop-down list. Any applicants within the selected admission group will be displayed immediately below.

3. Select the intake group from into which you wish to transfer applicants from the right-hand **Intake Group** drop-down list. Any admission groups within the chosen intake group can then be selected from the **Admission Group** drop-down list. Any applicants within the selected admission group will be displayed immediately below.
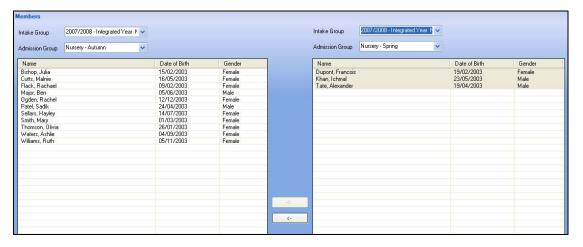
NOTE: An error message will be displayed in the Status Bar if you select the same intake and admission group combination on both sides.

4. If required, print the current application lists by clicking the **Print** button.

5. Select the applicants to be transferred on the left-hand side using any of the following methods:
   ▪ To select randomly listed applicants, hold down the **Ctrl** key and click the row of each required applicant to highlight them.
   ▪ To select sequentially listed applicants, single-click the first required applicant, hold down the **Shift** key, then single-click the last required applicant in the list (alternatively, hold down the **Shift** key and press the **Down Arrow** key).
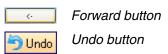

6. Click the **Forward** button to transfer the selected applicants to the other intake/admission group who will then be displayed in the right-hand list.

 Forward button

7. If any applicants have been transferred in error, either click the **Undo** button on the toolbar, or highlight their names in the right-hand panel and click the **Backward** button.

	Forward button
	Undo button

8. Once the required applicants have been moved, click the **Save** button to save the amended memberships.

For more information, please refer to:

- *SIMS .net Admissions Code of Practice – Own Admissions* handbook.
- *SIMS .net Admissions Code of Practice – Non-Own Admissions* handbook.

All handbooks can be accessed from the **Documentation Centre** which is launched by clicking the **Documentation** button on the **Home Page** in SIMS .net. Once open, click the **Handbooks** button, select the required handbook category then select the required handbook from the **Handbooks** page.

A sample selection of help sheets are available from the **Documentation Cente** in SIMS .net which can be accessed by clicking the **Documentation** button on the toolbar, then clicking the **Help Sheets** button. All available help sheets can be obtained from our SupportNet home page (http://support.capitaes.co.uk) by clicking the **Documentation** button, then selecting **Help Sheets** from the **Categories** drop-down list.

Training courses.

For information on training courses, please contact your SIMS Support Provider.

Providing feedback on this help sheet

If you have any suggestions or comments about this or any of our other help sheets, please email helpsheets@capita.co.uk.

Help sheet revision history

Doc. Version	Change Description	Date
1110-001	Initial Release	03/01/07
1110-002	Improved text to make it clear that the admission groups available for selection are determined by the chosen intake group.	25/01/07
1110-003	Updated cross references with new documentation location.	10/11/08