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# COLLECTION TOOL SUPPORT GUIDE

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# 1. INTRODUCTION

In the collection tool, you can add and manage course and provider information. The data feeds into search and discover tools, which prospective applicants and advisers use to search for courses.

It's important that your course and provider information is maintained

in the collection tool and:

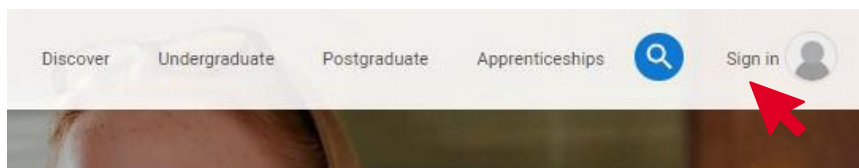
- ▶ is as current and complete as possible
- ▶ meets UCAS' **data standards**, as agreed in our terms and conditions of service – the system will give a warning if data fails validation
- ▶ is compliant with legal requirements, such as consumer protection laws, e.g. the requirements set out by the Competition and Markets Authority (CMA)

If you have any feedback on areas you would like us to cover in future versions of this guide, please contact us at [coursesdata@ucas.ac.uk](mailto:coursesdata@ucas.ac.uk).

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## 2. ACCESSING THE COLLECTION TOOL

To access the tool, you need to be a registered user (see section 3). Once set up, you will need to click '**Sign in**', in the top right-hand corner of the UCAS website ([ucas.com](https://ucas.com)).



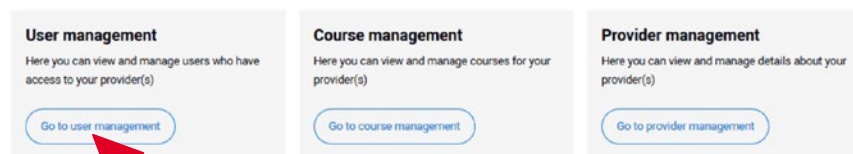
If you've already registered, enter your details and click '**Sign in**'. If not, click '**Register here**' and follow the on-screen instructions.

A screenshot of the UCAS 'SIGN IN' page. The page has a dark background with white text. At the top, there are tabs for 'Sign in' and 'Register'. Below the 'SIGN IN' heading, it says 'Please sign in below.' There are input fields for 'Email \*' and 'Password \*'. A link for 'Forgot your password?' is visible. A blue 'Sign in' button is at the bottom.

The next screen will display your personalised dashboard based on the permissions assigned to you by the user who created your account.

## 3. USER MANAGEMENT

To give colleagues access to the collection tool, select '**Go to user management**' from your dashboard.



On the '**User management**' screen, click '**Add user**', enter the relevant email address, assign permissions from the following screenshot and click '**Add user**' again.

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## User management

### Add user

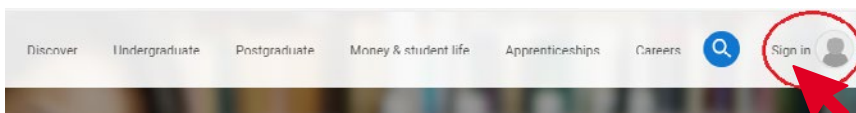
**i** Enter the email address of the person you wish to add as a new user. This will not send them an email.

Email address

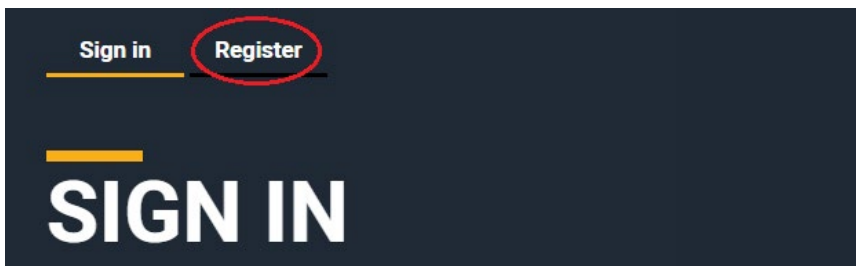
  
  

<b>User management</b>	<b>Application management (PGAMS)</b>	<b>Course management</b>
<input type="checkbox"/> Manage users at this provider	<input type="checkbox"/> Manage postgraduate applications to this provider	<input type="checkbox"/> Manage undergraduate courses at this provider
	<input type="checkbox"/> View postgraduate applications to this provider	<input type="checkbox"/> Manage postgraduate courses at this provider

This will not generate an email to the new user. Instruct the new user to go to [ucas.com](https://ucas.com), click **'Sign in'** from the top-right corner of the screen.



Click **'Register'** and follow the instructions to create sign in details. An automated email will be sent to the new user containing a link to **'Activate account'**. Clicking this link will complete the registration process.



Once registered, return to the sign in page, enter the email address you registered with and your password, and click **'Sign in'**.

Please sign in below.

Email \*

Password \*

  
  
[Forgot your password?](#)

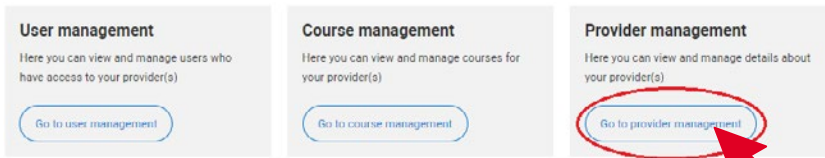
**Sign in**

Please note that UCAS are unable to create user accounts for agencies or third parties who may be managing your course data, without express permission from a registered user manager or Primary Correspondent at your provider.

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# 4. PROVIDER MANAGEMENT

To access your overarching provider information, click the **'Provider management'** option on the collection tool dashboard.



## 4a. PROVIDER DETAILS

The first screen shows your main provider details. To amend this information, e.g., your logo, address, website or alias, please email [coursesdata@ucas.ac.uk](mailto:coursesdata@ucas.ac.uk).

The **'Aliases'** field can be used to add an alternative name that your provider is commonly known as and searched for by. An alias is used as an alternative term or abbreviation to find a course provider in the search and discover tools. Location names are picked up from the locations section in provider management and shouldn't be used as aliases.

## Provider management

### Arts University Bournemouth

The screenshot shows the 'Provider details' page for Arts University Bournemouth. On the left is a sidebar with navigation links: Provider details (selected), Course contacts, Clearing contacts, Departments, Locations, Fees, English language requirements, and Subject options. The main content area has the title 'Provider details' and the university name 'ARTS UNIVERSITY BOURNEMOUTH'. Below this is a table of provider information:

Website	<a href="http://aub.ac.uk/">aub.ac.uk/</a>
Address	Wallisdown Poole BH12 5HH England
Provider code	A66 ⓘ
UKPRN	10000385 ⓘ
Sort name	Arts University Bournemouth ⓘ

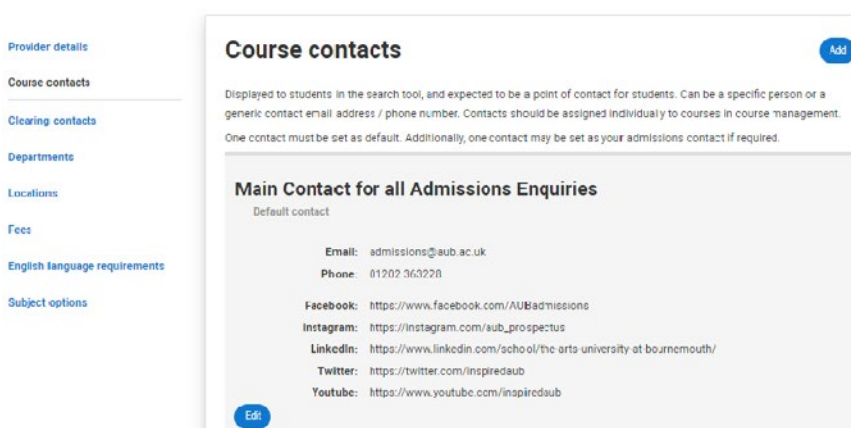
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The following options are available in the submenu on the left side of the page:

## 4b. COURSE CONTACTS

Here you can enter your applicant-facing contact information, which is displayed in the UCAS search and discover tools. You can list your general admissions contacts or specific contacts within schools or faculties.

### Provider management Arts University Bournemouth



Each course contact record must have a title. There is then the option to add an email address, phone number, and a fax number.

You can also add an online enquiry form url, as well as links to your course pages for any of the following social media channels; Facebook, X (Formerly Twitter), Instagram, LinkedIn and YouTube. These links appear in the search and discover tools, along with your other course contact details.

## 4c. CLEARING CONTACTS

Clearing contacts are displayed in the UCAS search and discover tools alongside your usual contact details, from July until September. This is an automatic change.

If you haven't entered any information here, we will use your default contact information. We recommend adding contact information in all the following sections. Changes to the main Clearing contact are updated immediately in search and discover tools when the information goes live in July.

**Confidential Clearing Contact** – is designed to help providers contact each other during Confirmation and Clearing, when normal office numbers may be rerouted to Clearing lines. This number is only available for other providers to view in the secure section of [ucas.com](https://ucas.com).

**Text Alert Contact** – is used by UCAS to provide critical updates during Confirmation and Clearing, including results processing updates and system issues and outages. This number is not visible to anyone outside of UCAS.

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## 4d. DEPARTMENTS

Departments are required when creating a new course to the collection tool. So, when setting up for the first time, ensure that you add any relevant departments, faculties, academic schools or colleges.

## 4e. LOCATIONS

You must set up one or more locations of study in order to add a course on the Course Management page of the collection tool. All locations require a **'Location code'** – chosen by the provider. We recommend that you match any in-house codes you currently use, as this information is visible to applicants.

You can add a 'Location category' to indicate whether the location is a 'Main site,' 'Campus,' 'Franchise location,' or 'College (College group).' If 'Franchise location' or 'College Group' is selected a specific location url and logo can be assigned.

### Provider management Arts University Bournemouth

The screenshot shows the 'Locations' management interface. On the left is a navigation menu with options: Provider details, Course contacts, Clearing contacts, Departments, Locations (selected), Fees, English language requirements, and Subject options. The main content area is titled 'Locations' and includes an 'Add' button. Below this is a description: 'Specifies the main location of study for a course. The location name is shown on the search tool, and the postcode of the location determines where courses are displayed when viewing search results on the map view. Locations are assigned individually to course options in course management.' A note states: 'At present, courses in the UCAS Undergraduate scheme must be assigned to a location with a location code. Conservatoire courses must be assigned to the location with location code " - '.

The main entry is for 'Bournemouth and Poole College' with the following details:

Location category	Franchise location
Location URL	https://www.thecollege.co.uk/schoolleavers?gidid=EAInIQobCRM14x298u-e9AVV_wiCR10vQeJEAAVASAAEgI_L0_BwE
Location code	A
Address	North Road Poole
Postcode	BH14 6LS
Country	United Kingdom
Region	South West England

There is an 'Edit' button at the bottom left of the entry.

## 4f. FEES AND ENGLISH LANGUAGE REQUIREMENTS

You can specify the cost of tuition for a course and any other additional costs that the applicant should be aware of. Here you can create a fee template and then copy the data from a template to courses in bulk by using the 'Copy to courses' button.

Similarly, you can add requirements relating to specific English language tests by creating a template and then copying the data from the template to selected courses.

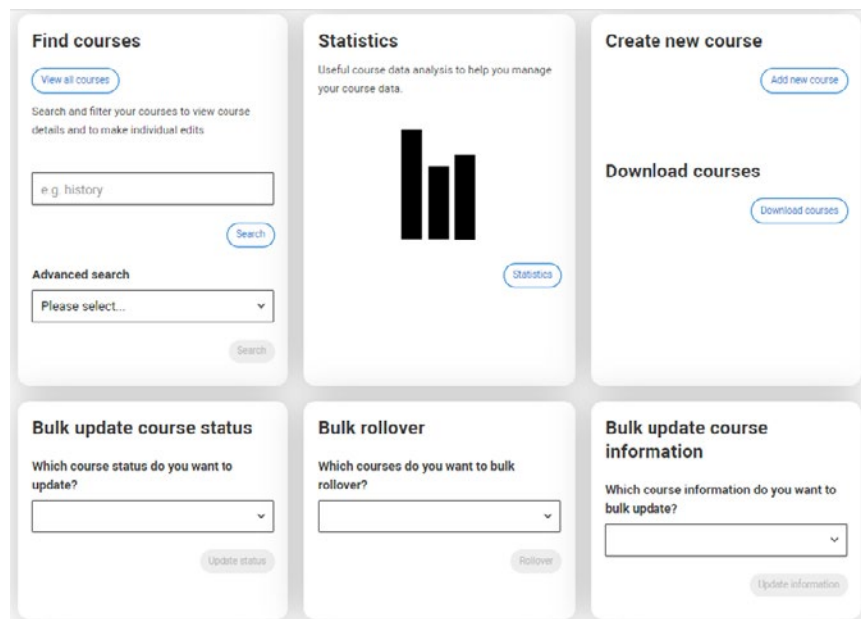
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# 5. COURSE MANAGEMENT

## 5a. COURSE MANAGEMENT PAGE

The new course management homepage is your starting point for accessing and amending course and vacancy information.



To access your course list, click the **'View all courses'** button. From here, you can view the status of your courses in various formats.

The search field at the top of the page can be used to find assigned course details, e.g. course title, internal reference code or application code. This will display all unarchived versions of the course, across all intakes.

### Course management

Search for course title, internal reference or UCAS application code



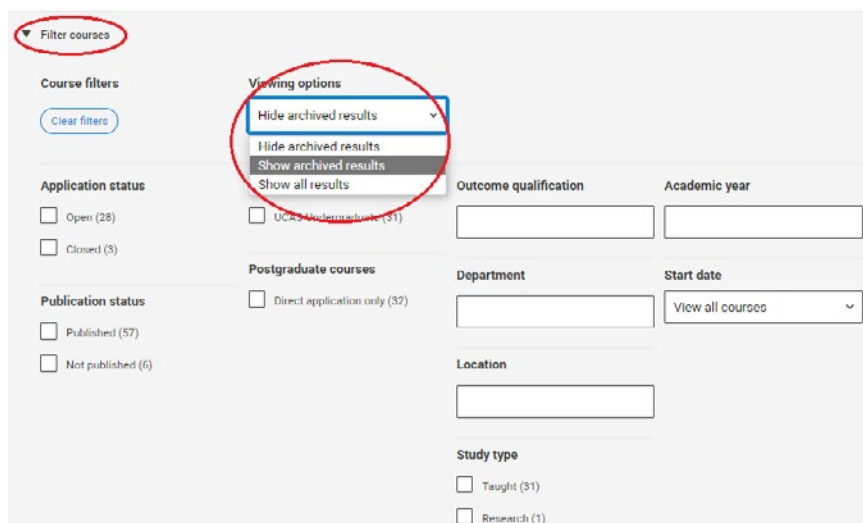
At the top right of the page, there is a menu signified by three dots. The menu has three options:

- ▶ **Bulk management** – for updating the status or information of several courses, or rolling over course information from one intake year to another.
- ▶ **Download courses** – for producing and downloading a CSV report of your course information across several pre-set options.
- ▶ **Statistics** – a quick and easy way to assess and check the status of courses. Graphs are provided across schemes and intakes to show options, such as number of courses, published or unpublished, or open or closed vacancy status.

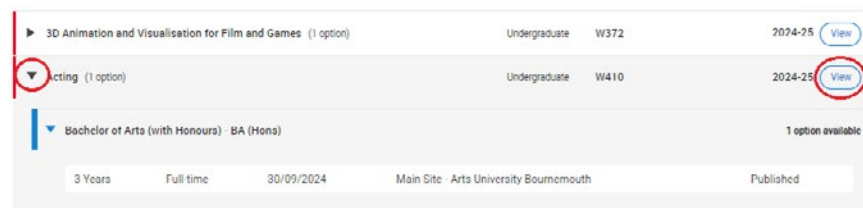
On the course management page, you can view your courses across all intakes. By default, archived courses are hidden from view. If you would like to view your archived courses, click the **'Filter courses'** option below the search field. Select the drop-down menu below **'Viewing options'**, and choose **'Show archived results'**.

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Other filters are available, including academic year, outcome qualification, scheme, department, location and application/publication status. These filters will affect the course list that displays below the **'filter courses'** option.



The black triangle by a course title allows you to display some of the course option information without having to click into the course itself.



If you see multiple rows for a single course, this is because it is currently unarchived in multiple intakes.

The intake that the course is attached to is displayed next to the course information.

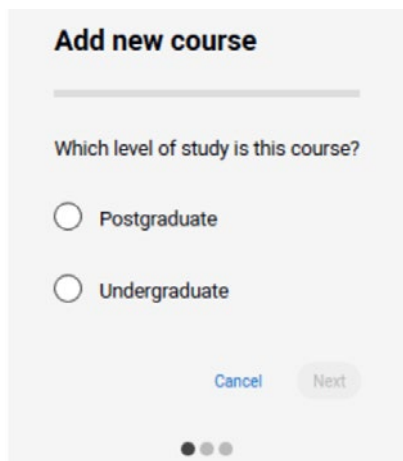
To view the full course information, click the **'View'** button.

To return to the course management page, click **'Back to course list'** on the top left corner of the screen. Similarly, clicking **'Back to my dashboard'** on the course management page will take you back to the dashboard.

## 5b. CREATE A NEW COURSE

On the course management page, click the **'Add new course'** button in the top right corner.

Choose which level of study your course is.



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UCAS has an agreement with providers for the listing of a selection of full-time postgraduate courses in the UCAS undergraduate scheme.

These are currently limited to postgraduate or pre-registration courses in:

- ▶ Midwifery
- ▶ Social Work
- ▶ Nursing
- ▶ Physician Associate Studies

Scottish and Welsh postgraduate teacher training qualifications should also be listed.

As part time courses do not receive applications through UCAS, select '**Direct application only**.' These courses do not require an application code and cannot be opened or closed. However, they can be added to existing UCAS scheme undergraduate courses.

For the purpose of creating an example course - we're adding a full-time UCAS scheme undergraduate course.

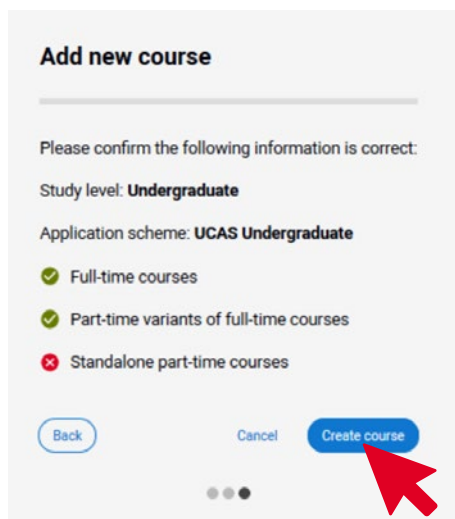
Make your selection, and click '**Next**'.

The screenshot shows a mobile interface for adding a new course. At the top, it says 'Add new course' with a horizontal line below it. The question 'How will this course receive applications?' is displayed. There are two main sections: 'UCAS schemes' and 'Direct application only'. Under 'UCAS schemes', there are two radio button options: 'UCAS Conservatoires' and 'UCAS Undergraduate'. Below this, the word 'or' is centered. Under 'Direct application only', there is one radio button option: 'Direct application only'. At the bottom, there are three buttons: 'Back' (highlighted with a blue circle), 'Cancel', and 'Next' (disabled). There are also three small grey circles at the very bottom, likely for navigation.

A confirmation message will display. If you are happy to proceed click '**Create course**'.

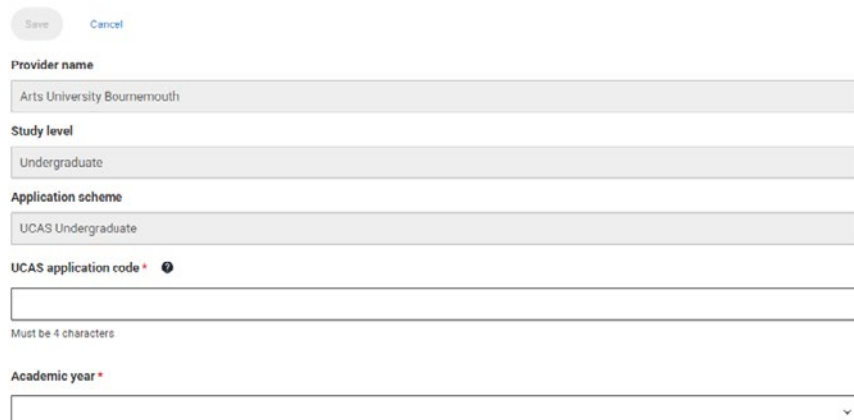
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You can now create your course.



Choose a UCAS application code. This is the four-character alphanumeric code that applicants use to specify their desired course. It can be any combination of characters - apart from the letter E, and does not need to follow any particular convention. Once you've chosen a code, it cannot be amended or assigned to more than one course.

You also need to select which academic year the course will running, e.g. 2025-26. An academic year runs from August until July.



You must complete all mandatory data fields before you can save the course profile.

**Course title** – can be a maximum of 150 characters and should accurately reflect the content of the course. Do not include any information that is listed elsewhere in the course profile, such as qualification outcome, study mode, location or duration.

When a course title is longer than 80 characters long, the courses 'short title' will be used when applicants are searching for the course in the UCAS application. Please make sure the short title is clear and understandable for applicants.

**Summary** – this is one of the first sections a potential applicant reads to get a feel for the course and content offered. The summary should be accurate, up-to-date, and informative, covering course content and any information you feel an applicant would want to know. You may find **guidance on providing information to prospective students** from the Office for Students, HEFCW and

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the Scottish Funding Council useful. The Degree Apprenticeship and Graduate Apprenticeship (Scotland) flag is available to select directly below the summary section.

**Short title** – this field is automatically populated, based on your main course title. The Short title can be amended. We recommend making this a meaningful title as any full course title over 80 characters will be replaced with the short title in the choices section of the UCAS application.

**Abbreviated title** – used for reference data in UCAS' backend systems, this is not publicly visible. The abbreviated title appears in your 'UG Courses' and 'PG Courses' reports that are in the collection tool ([see section 8](#)) – you may want to take this into account when assigning abbreviated titles.

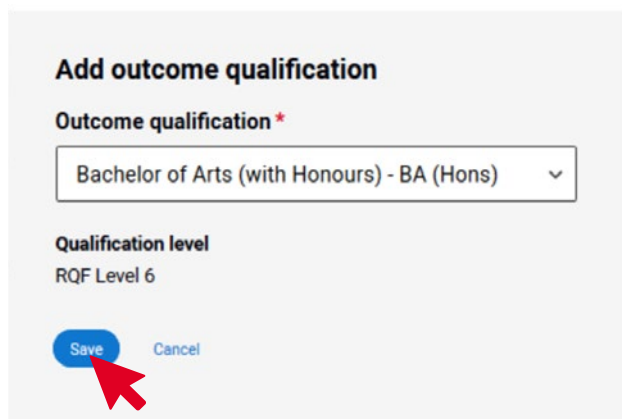
**Department** – you can select the department from a drop-down list which reflects your master list of department titles in the provider management section (see chapter 4d).

**Search subjects** – a pre-populated list of words an applicant might use as a search term when looking for courses. You need to make at least one selection (although you may choose as many you like). Terms should be chosen which reflect the exact content of the course, or to provide alternative names for topics.

**HECoS subject codes** – these codes are used for classification in our internal systems, by the SLC (Student Loans Company), and also for your HESA return. Your planning department should guide you in your choices of HECoS subject codes. A list of available codes can be accessed on the HESA website to help with classification.

## 5c. ADD OUTCOME QUALIFICATION

Once you have created your course profile and clicked the 'Save' button, you need to add an outcome qualification. Click the 'Add outcome qualification' button and select from the 'Outcome qualification' drop-down list. Click 'Save' to confirm your selection. You can have as many outcome qualifications listed under a course profile as required.



**Add outcome qualification**

Outcome qualification\*

Bachelor of Arts (with Honours) - BA (Hons) ▼

Qualification level

RQF Level 6

Save Cancel

The 'Business rules' is the only mandatory element in the outcome qualification section. We recommend that you complete the assessment methods, modules, course URL and use the Higher Technical Qualifications (HTQ) flag where appropriate.

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**Business Rules** – this drop-down menu enables you to assign the appropriate rules based on whether it is a standard course or a medicine, dentistry or veterinary science course. The business rule that you select will determine the number of course options learners can apply to and ensure that only valid combinations of course options can be chosen. It also automatically determines the appropriate equal consideration deadline for the course.

Course fees can be entered in the outcome qualification section of a course profile. These can be used as a default for all related course options, or you can add fees individually to each course option. Alternatively, you can copy fees from templates created in the provider management section.

## 5d. COURSE OPTIONS

The third and final section of a complete course listing is the **'Course option'**. Here you provide details about the specific intake, such as start date and location.

Click the **'Add course option'** button and populate the following mandatory fields:

**Study mode** – the attendance type for the course, e.g. full time, sandwich, or distance learning.

**'Blended learning (full-time)'** and **'Blended learning (part-time)'** are included in the 'study mode' menu. These enable providers to correctly list courses that are studied remotely but require some attendance.

**Start date** – if the course has a specific start date, enter the day, month, and year, or if applicable, just the month and year. For courses where there is no specified start date, you can tick the 'start at any time' option. If a start date is added without a start day, it will automatically default to the 1st of the month

**Location** – this is the place of study and requires an assigned 'location code' so that it appears in the UCAS application. The codes are managed in the provider management area of the dashboard.

**Duration** – you can either select a specified duration, or enter a range, e.g. two – four years.

**Available entry points** – courses will default to accepting applications from students entering into the first year. You can add alternative entry points for courses that accept students joining courses in other years e.g. Foundation year, 2nd year etc. This information will appear in the 'How to Apply' section of the course page on Search. Please note that this is for information only and does not stop an applicant from applying to any entry point.

**Standard qualification requirements** – [See section 5h.](#)

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There are also non-mandatory data fields, including:

**Course code applications only (CCAO)** – this can be used for courses with few remaining vacancies, that can attract a large volume of Clearing applications. This flag prevents courses from appearing in search and discover tools or in the course drop-down list in the UCAS application. Unplaced applicants are only able to select these courses by manually entering the course code into the UCAS application.

This tick box is available regardless of the current status of the course option, however, selecting CCAO will automatically change its status to 'Closed' and 'Unpublished'. The option to put a course into CCAO will only appear once the equal consideration deadline has passed.

**Deferred entry** – This information will appear in the 'How to Apply' section of the course page in Search. Please note that this is for information only and does not stop an applicant from applying for deferred entry in the application.

**Subject to validation** – here you can flag a course that is still subject to approval. Doing so will result in a message appearing on search and discover tools.

**Additional requirements** – [see section 5i](#).

**English language requirements** – add any English language requirements to help international students see if they meet the required English language standard. You can add an overall score and additional information for each test.

**Fees** – we encourage you to enter fees for your course options. You can set up a default fee in the outcome qualification section of the course profile and apply it to your course options, or you can add fees individually to each course option. Alternatively, you can copy fees from templates which are set-up in the provider management section.

You can specify which geographical domicile the fee applies to (e.g. England, Channel Islands, International, etc.). There are also tick boxes that can be used to denote if the course is free, or if it is a provisional fee. Flagging these tick boxes will result in a message displaying to potential applicants in search and discover tools.

The 'Fees' section reflects the UK's departure from the EU. A tick box for 'Republic of Ireland' is available to indicate a unique fee for this domicile if required.

Click '**Save**' when you have completed your course options.

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## 5e. PUBLISHING COURSES

The default status of your newly created course option will be:

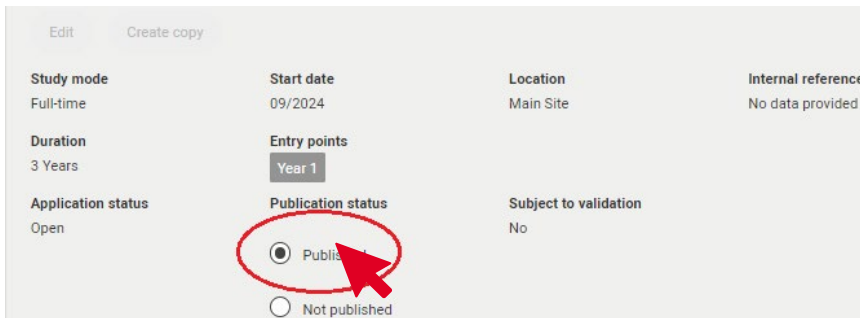
Application status: **'Closed'**

Publication status: **'Not published'**.

Therefore, it will not display in the UCAS search and discover tools, or be selectable in the UCAS application.

To set the status to published, go to the **'Bulk actions'** drop-down menu directly above the first course option in your list. Select **'Publication status'** and click **'Go'**.

The following published/not published radio buttons will be displayed. Make your selection and click **'Save'**.



The screenshot shows a form with the following fields:

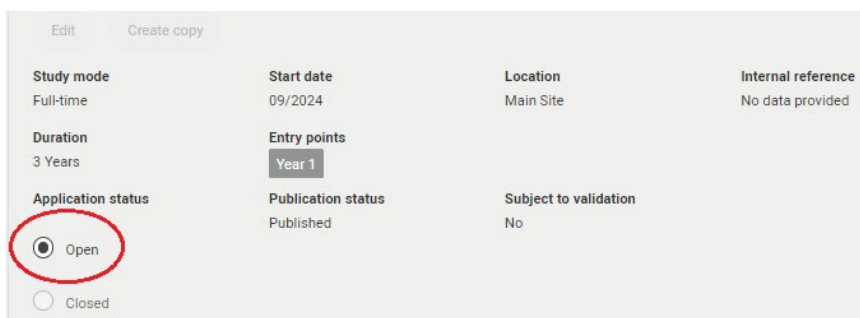
Study mode	Start date	Location	Internal reference
Full-time	09/2024	Main Site	No data provided
Duration	Entry points		
3 Years	Year 1		
Application status	Publication status	Subject to validation	
Open	<input checked="" type="radio"/> Published <input type="radio"/> Not published	No	

## 5f. OPEN FOR APPLICATION

Changing the application status of a course option to open is necessary for it to appear as an available selection in the UCAS application.

To amend the application status to **'Open'** go to the **'Bulk actions'** drop-down menu directly above the first course option in your list. Select **'Application status'** and click the **'Go'** button.

The following open / closed radio buttons will be displayed. Make your selection and click the **'Save'** button.



The screenshot shows a form with the following fields:

Study mode	Start date	Location	Internal reference
Full-time	09/2024	Main Site	No data provided
Duration	Entry points		
3 Years	Year 1		
Application status	Publication status	Subject to validation	
<input checked="" type="radio"/> Open <input type="radio"/> Closed	Published	No	

The application status, archive status, publication status and vacancy status can also be bulk updated through the **'Course management'** section under **'Bulk update course status'**.

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## 5g. AMEND VACANCIES

When your course option is open and published, and therefore able to receive applications by default, it will be listed as having vacancies.

Each course option will have a vacancy management section. **'No vacancies'** can be selected, once the relevant equal consideration deadline date has passed (this option will not be available before then).

Following the UK's departure from the EU we have made an update to the **'Vacancy management'** section. There are now additional categories designed to help you better manage your vacancies. Please note that the categories available depend on your provider location. For example, Scottish providers will have a separate 'Scotland' category.

**Vacancy management** ⓘ

Vacancy status can be changed once the equal consideration deadline has passed.

	Vacancies ⓘ	No vacancies ⓘ
UK	<input checked="" type="radio"/>	<input type="radio"/>
Republic of Ireland	<input checked="" type="radio"/>	<input type="radio"/>
EU	<input checked="" type="radio"/>	<input type="radio"/>
International	<input checked="" type="radio"/>	<input type="radio"/>

This course is not accepting applications from international learners. ⓘ

## 5h. STANDARD QUALIFICATION REQUIREMENTS

Each course option has an **'Edit standard qualification requirements'** link, which can be accessed by selecting the **'Edit'** button. As this is a mandatory requirement, you need to enter some information into this section to be able to save it.

There are several subsections, including:

- ▶ UCAS Tariff
- ▶ A level
- ▶ Pearson BTEC Level 3 National Extended Diploma
- ▶ Access to HE Diploma
- ▶ Scottish Higher
- ▶ Pearson BTEC Level 3 National Diploma
- ▶ Pearson BTEC Level 3 National Extended Certificate
- ▶ Scottish Advanced Higher
- ▶ International Baccalaureate Diploma Programme
- ▶ T-levels
- ▶ Contextual Information for course and contextual information URL link

Additional qualifications can be selected from a drop-down menu if required.

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We have added T Levels as a standard entry requirement. Search and discover tools have also been updated to display T Levels within the entry requirements.

There is also a free text '**Further information**' field to add information and a '**Provider entry requirements URL**' field.

Within this section is an option to include Contextual information for the course and a contextual information URL that will link to your website.

Entry requirements for entry points beyond year one can be entered onto a course option. When selecting a point of entry other than year one or foundation year, an additional free text field will become available to capture these requirements.

Minimum entry requirements (Scottish only) – minimum qualification entry requirements can be added for a course. The minimum requirements should reflect the grades that a widening access student will need to achieve by the time they enter university or college. A student should be able to successfully complete the course if they have these grades.

## 5i. ADDITIONAL REQUIREMENTS

Each course option has an '**Edit additional requirements**' link, which can be accessed by selecting the '**Edit**' button. There are tick boxes that can be checked to indicate various requirements such as; Admission tests, Audition, Interview, and Criminal records declaration (DBS / Disclosure Scotland).

We request that you only ask applicants who apply for certain courses, for example, those that involve work with children and vulnerable adults, such as medicine, teaching, social work or have a nursery on-site – to declare whether they have any criminal convictions, including spent convictions.

Please note: Once your course option is published, the '**Criminal records declaration**' flag cannot be amended. UCAS has published a series of **good practice resources** to support providers.

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## 5j. COURSE STATUSES AND THEIR OUTCOMES

There are various statuses that can be assigned to your course options. The UCAS search and discover tools and UCAS application, and other external course listing sites that we share information with, are all impacted by changes to course status.

Collection tool flag	Outcome	Note
Publish status	Adds or removes the course from the search and discover tools and external course listing sites.	Timings vary between systems and our partner sites. Our search and discover tools update straightaway, but our partner sites may take longer.
Application status	Adds or removes the Apply button from the search and discover tools. Prevents applicants from selecting the course in the UCAS application.	This does not remove the course from the search and discover tools, but does produce a flag to say the course is no longer open for applications.
Archive status	Unpublishes and closes the course.	This should only be used if the course has been discontinued and is no longer running. Archiving a course cannot be used to close a course that is running.
Vacancy status	Adds or removes the Apply button from the search and discover tools. Prevents applicants from selecting the course in the UCAS application.	This can only be amended once the equal consideration deadline date has passed for the course. This does not remove the course from the search and discover tools, but does produce a flag to say the course is no longer open for applications.

## 5k. EDITING A COURSE

Once a course is created, it can still be edited to make updates. There are some exceptions however, such as the UCAS application code, which cannot be amended.

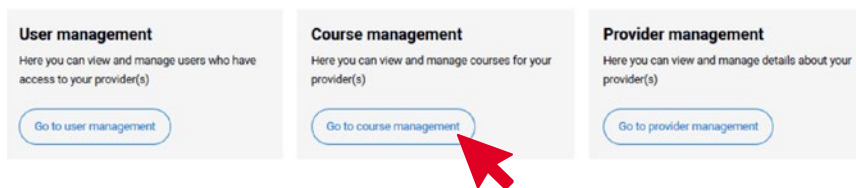
Please note that there is an **'Edit'** button for each separate section of a course profile. Therefore you can click the relevant **'Edit'** button for the section you want to update. When in edit mode, all other **'Edit'** buttons on a course profile are inaccessible until you either click **'Cancel'** or **'Save.'**

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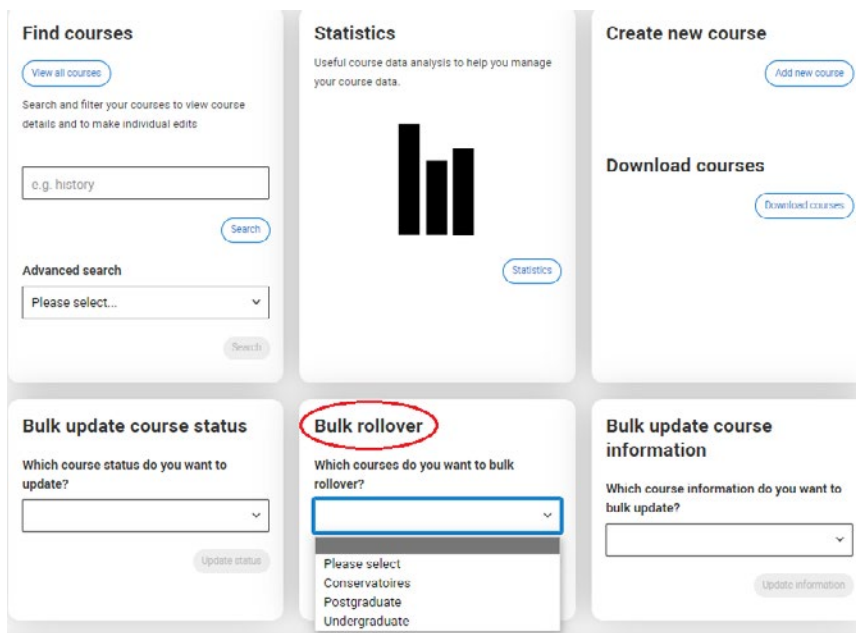
# 6. ROLL OVER COURSE OPTIONS TO A NEW CYCLE

Course profiles in the collection tool belong to one or more specific academic years. Each May, the following year's list of courses will 'go live' in UCAS' search and discover tools and the Undergraduate application, with Conservatoires application going live in July. Leading up to this we request that all providers roll over their course list from one year to the next and make any required updates so that the search and discover tools are populated with accurate course information. Please be aware, if you do not roll over your courses to the following intake, applicants will be unable to search or apply to your courses for that year.

To roll over courses in bulk on the collection tool you'll need to select **'Course management'** from your dashboard.



On the courses home page scroll down to the **'Bulk rollover'** tile. Select the correct scheme and click **'rollover'**.



On the next screen select the year you are copying from (your source year) in the drop-down menu. Click the **'Next'** button that appears in the top right of your screen.

Search for the appropriate course(s) and click the corresponding tick box. Alternatively you can use the **'Select all'** button to indicate all the courses listed. Use the filters below the search field to narrow down the results, e.g. **'Department'** or **'Publication Status'**. Once you've chosen the courses you want to roll over, click **'Review'**.

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A summary of the selected courses will be displayed. Check your selected courses to ensure you have chosen the correct options to roll over. Now click **'Create course options'** located in the top right of the screen. If there were any issues a message will explain which courses did not copy and detail why. Once finished, you'll be returned to the Course management page.

You can also roll over courses on an individual basis:

- ▶ Select the course you wish to update by clicking the corresponding **'View'** button on your course management list.
- ▶ Click the **'More'** button located in the top right corner of the screen and select **'Create new academic year'**.
- ▶ Select the required academic year.
- ▶ Select the academic year you want to copy from, and click **'Next'**.
- ▶ Select the outcome qualifications / options to copy into the new academic year and select **'Create'**.

**Please note that courses are rolled over with the status of 'unpublished' and 'closed to applications'. Follow the usual steps to set these courses to active when appropriate. You can either do this via the 'Bulk Management' option or alternatively click into each course and amend the course option directly.**

**Publication status:** this controls whether a course is listed in our search and discover tools.

- ▶ Courses flagged as **'Published'** are visible in the UCAS search and discover tools
- ▶ Courses flagged as **'Not published'** are not visible in the UCAS search and discover tools
- ▶ This flag has no other implications in UCAS products or systems

**Application status:** this controls whether an application can be made to the course in the UCAS application.

- ▶ Courses flagged as **'Open'** will display in the UCAS application, and applicants can select it, as long as it has vacancies
- ▶ Courses flagged as **'Closed'** will not display in the UCAS application.

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## ROLLOVER CHECKLIST

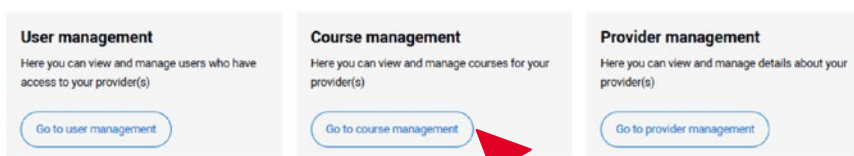
When rolling over your courses to a new year, be mindful that course information is likely to differ from year to year. Please ensure that you make any necessary amendments to the following sections:

- ▶ Course title
- ▶ Course summary
- ▶ Modules
- ▶ Course Specific urls
- ▶ Start dates
- ▶ Study mode
- ▶ Qualification requirements - including T-Levels entry requirement option.
- ▶ Tariff points - make sure the tariff points are accurate and up-to-date.
- ▶ Higher Technical Qualifications - select this flag in the 'outcome qualification' section of a course profile if your course is a Higher Technical Qualification.
- ▶ Additional requirements (e.g. criminal records declaration, interview information)
- ▶ Contextual information for the course and a contextual offer URL.
- ▶ Degree apprenticeship flag - select this flag if your course is a degree apprenticeship or graduate apprenticeship (Scotland).

The collection tool has functionality to assist you with the rollover process, e.g. generating reports to summarise your courses data. Our rollover guide and e-module on our digital platform are available to help with the rollover process.

## 7. BULK UPDATING COURSE INFORMATION

To change course statuses, or information in bulk, select '**Go to course management**' from your dashboard.



Once on the course management page, click the three dots in the right corner to reveal a menu.

### Course management



The menu contains three options – '**Bulk management**', '**Download courses**', and '**Statistics**'. Click 'Bulk management' to go to the '**Bulk course management**' screen.

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## Bulk course management

Cancel Next



Which bulk action should be applied?

A screenshot of a web interface showing a dropdown menu. The menu is titled 'Please select' and has a blue border. The options listed are: 'Please select', 'Edit course status', 'Edit course information', and 'Rollover course options to a new year'. A red mouse cursor is pointing at the 'Edit course information' option.

'Which bulk action should be applied?' - has three available options:

- ▶ Edit course status
- ▶ Edit course information
- ▶ Rollover course options to a new year

Rolling over courses is covered in [section 4](#) of this guide. Selecting either of the other options will produce a second drop-down to list specifically what you would like to amend:

### EDIT COURSE STATUS

- ▶ Application status
- ▶ Archive status
- ▶ Publication status
- ▶ Vacancy status

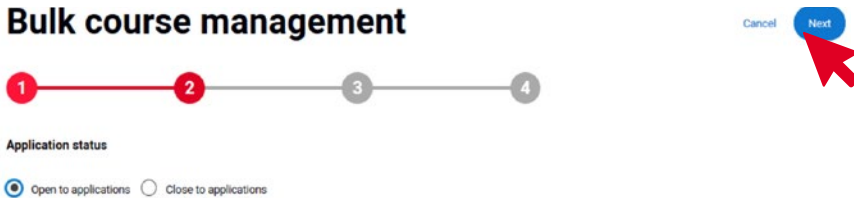
### EDIT COURSE INFORMATION

- ▶ Course code applications only (CCAO)
- ▶ Additional requirements
- ▶ Deferred entry
- ▶ English language requirements
- ▶ Entry requirements for entry points beyond year 1
- ▶ Fees
- ▶ Minimum qualification requirements
- ▶ Start dates
- ▶ Standard qualification requirements
- ▶ Vacancy status

Once you've chosen the option to bulk update, select the 'Next' button displayed in the top right corner. From here you can amend the status – for example, 'Open to applications' or 'Close to applications'.

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## Bulk course management



Once selected, click the **'Next'** button in the top right of the page.

You'll be presented with all the courses available to bulk update.

If a course is missing, it's because it already has the status you're trying to assign to it.

Use the filter to narrow down course types, e.g. academic year, scheme or location.

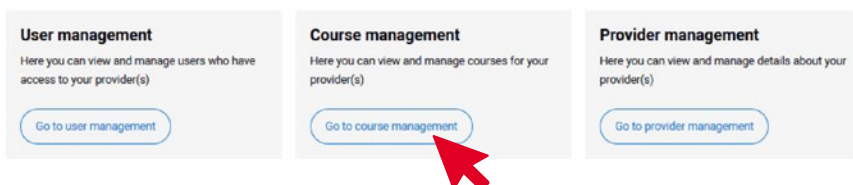
Either click the individual course's tick box to make your selection or choose the **'Select all'** option above the course list. Once selected, a Review (x) in the top right of the page is displayed. Click this and you'll receive a list of chosen courses.

Check the list to ensure you're selecting the correct courses.

Once you've clicked **'Confirm'**, a window will appear to confirm the updated status.

## 8. REPORTING

The collection tool has the functionality to assist you with your course management. To access the available reports, select **'Go to course management'** from your dashboard.



On the course management page you'll see three dots '...' from here, click the three dots in the right corner to reveal a menu.



Once selected, the three dots will display a menu with three options – **'Bulk management'**, **'Download courses'**, and **'Statistics'**.

If you click **'Download courses'**, a pop-up window will display showing all the available options for you to run reports against.

Reports include:

- ▶ a complete list of your undergraduate or postgraduate course information
- ▶ fee information for any scheme
- ▶ reporting to support your annual Discover Uni returns

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Once you've selected the tick box for the reports you require, click **'Next'** in the lower right of the screen. Your report will then be generated as a CSV file, and a download button will be displayed.

**Download course information**

Which course data would you like to download?

- All
- PG courses
- UG courses
- PG fees
- UG fees
- UG additional requirements
- UG qualification requirements
- UG English language requirements
- PG English language requirements
- Discover Uni
- Vacancy status

Cancel Next

Click **'Download'**, and you will be asked where you would like this information to be downloaded.

**File generation complete**

Your files are ready to download

PG courses ✓

Cancel Download

## COLLECTION TOOL HELP

If you require a report that is not available by default, please get in touch with [coursesdata@ucas.ac.uk](mailto:coursesdata@ucas.ac.uk) and the team will be happy to help you.

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# 9. COLLECTION TOOL TIPS FOR 2025/2026

- ▶ Archived course options will not appear as available course options when rolled over onto the next cycle.
- ▶ **'Archive'** should ONLY be used if a course option is discontinued and no longer running.
- ▶ Closing course vacancies can only be done after the relevant equal consideration deadline.
- ▶ Course code application only (CCAO) status can be applied to your courses in bulk ([see section 7](#)).
- ▶ Information input on the collection tool should accurately reflect the information provided on your website.
- ▶ Remember to update your fees from year to year for each domicile.
- ▶ If you would like to update your provider logo, please contact us at [coursesdata@ucas.ac.uk](mailto:coursesdata@ucas.ac.uk) and we will be able to update it for you.
- ▶ Open day information and tile/banner images in the search and discover tools, are not updated through the collection tool. Please contact us for more guidance on updating this information.
- ▶ Make use of the 'Search subjects' function by assigning and removing subject terms to ensure that your courses appear in relevant searches. You can download a 'UG courses' report from the collection tool to see all the search subject terms that your courses are currently listed with.
- ▶ Please remember that January to July course start dates and course statuses are amended under the previous cycles course options. August to December are amended under the current cycles course options. If you experience issues opening and publishing your January to July start dates, please contact us.

A contextual information option and a contextual information URL field are available in the standard qualification requirements section of course options. Here you will be able to enter any information regarding extending offers below your standard entry criteria to those with strong portfolios or students who have faced challenges impacting their performance and were anticipated to achieve higher results.

The screenshot shows a form titled "Additional contextual information". It contains two main sections: "Contextual information for course" and "Contextual information URL".

**Contextual information for course** (with an information icon):  
The contextual information statement (and url) will be displayed on the course details pages on ucas.com under the course entry requirements to help students understand how application context is considered when reviewing applications.

Below this text is a large text input field. Below the field, it says "Maximum 500 characters."

**Contextual information URL** (with an information icon):  
Below this text is a smaller text input field.

At the bottom left of the form, there are two buttons: "Done" (in a blue circle) and "Cancel".

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