

# DOCUMENT MANAGEMENT - PRACTICAL STEPS CHECKLIST

UCAS has compiled this document to help you think about the changes you might need to make to prepare for applicants uploading supporting evidence as part of their application. UCAS is happy to support you and your colleagues with readiness – get in touch with [providerdevelopments@ucas.ac.uk](mailto:providerdevelopments@ucas.ac.uk) if you have any questions, or for technical queries please contact Service Delivery Management (Technical) team at [sdmtech@ucas.ac.uk](mailto:sdmtech@ucas.ac.uk).

## Key Dates:

- 2026 cycle - Direct to Clearing (DTC) applicants - accessed through Web-Link only
- 2027 cycle - all applicants – accessed through Web-Link and UCAS-Link

## PREPARATION PHASE: August 2025 – December 2025

### Identify stakeholders - who needs to know about the changes?

Map out your key stakeholders, working through your organisational structure to identify anyone who needs to know and set up a working group to help prepare for change, for example:

- Operational staff in Admissions teams / International teams
- Outreach team
- Website/content teams
- Registry team
- Student support team
- Security team
- Student Record System (SRS) developers and your technical support teams

Liaise with Legal and Data Governance teams early in preparation for reviewing policies and procedures and understanding any further actions required e.g. limiting staff access to documents.

## 1. When and how will you update colleagues?

Plan how you are going to liaise with staff during operationally busy periods between now and May 2026 when the 2027 cycle goes live.

- Does everyone need the same level of detail?
- How do colleagues prefer to receive information? E.g. – demos or training for example
- What timeframes will they need to support this change?

## 2. Review materials - what internal policies, processes, training materials and assessment frameworks need updating?

- Complete an audit on current policies, processes, training, and assessment frameworks that would need updating/alignment with UCAS' document management service.
- Who will need to approve these, and what documentation will need to be provided to support this?
- How do you communicate policies and frameworks publicly?
- Consider how this will interact with any existing processes for collecting information – applicants may feel frustrated if they must share the same documents multiple times.
- Review permissions to use and access Web-Link, see [Web-Link user guide](#).

## 3. Engage Technical Teams early – discuss plans

UCAS is working closely with Student Record System (SRS) developers and your technical support teams. To ensure a smooth integration, we recommend the following steps:

- **Start planning early:** Begin thinking about how and when you want to consume documents. Reach out to your SRS vendor to discuss your approach and timelines.
- **Review the [UCAS Technical Briefing document](#):** This document has already been shared with SRS developer. Familiarise yourself with its contents, particularly around storage overheads and the potential impact on your existing document management solutions. This document further information e.g. file types and sizes can be found here – [provider development updates](#)
- **IP address requirements for UCAS-Link:**
  - To use the Document Management endpoint on UCAS-Link, you must provide the IP address range from which your SRS will access UCAS-Link. This is necessary to ensure documents are only downloaded by the intended recipient.
  - To enable document management functionality, you'll need to confirm the IP address your SRS will use to connect. Coordinate with your technical teams or supplier to obtain this information. You can request to add or update this IP address via the [Halo support portal](#).

If you work with a software vendor, it is critical that you ensure you have understood the steps they will need to you take in order to be able to use Document Management, and that you have either completed these or have plans in place to have completed them before your teams need to access any documents.

- **Follow onboarding instructions for UCAS-Link:**  
Please refer to the [UCAS-Link Guide](#) for detailed onboarding steps.
- **Requesting access:**  
Access to UCAS-Link (both test and production environments) must be requested separately via the [Halo support portal](#).
- **Need help?**  
For any technical queries, please contact our Service Delivery Management (Technical) team at [sdmtech@ucas.ac.uk](mailto:sdmtech@ucas.ac.uk).

## TESTING PHASE: mid-January 2026 - August 2026

### System readiness and testing

UCAS will make the service available in the HEP 3 test and training environment (<https://www.ucas.com/providers/our-products-and-services/managing-applications/test-and-training-environments>) and will be working closely with SRS developers and your technical support teams. Agree a schedule of testing with internal systems and student record system integrations. Use the [UCAS Technical Briefing document](#) and confirm systems can import and handle new formats as set out in plans agreed with your SRS. If you work with a software vendor, it is critical that you ensure you have understood the steps they will need to you take in order to be able to use Document Management, and that you have either completed these or have plans in place to have completed them before your teams need to access any documents.

## 4. What, if any, external presentations and materials need updating?

Book in time with your content teams. Review and update external materials including student-facing content and presentations on how to apply through UCAS. Pilot the messaging with internal stakeholders.

### Staff training & briefings

UCAS recommends that you hold briefing sessions with all student-facing staff; ensure that they are confident in answering questions or know where to find relevant UCAS information. Share updated and finalised materials and FAQs.

## LAUNCH PHASE: May 2026- September 2026

### 5. What does your website need to say, and when?

Plan to update your applicant facing content, considering any statements you want to make as an organisation about how UCAS document management will complement your own mechanisms for students to upload supporting evidence and get them approved in advance. Set and agree the date for launch to align with all other cycle specific information, e.g. your own retention policies.

### 6. Ongoing support and feedback loops

- Monitor issues and feedback from staff and students and adjust materials, training, or systems as needed.
- Maintain cross-team coordination during live cycle and feedback issues to UCAS as required.
- UCAS requests you engage with surveys and feedback to help understand experience and help shape developments for upcoming phases.

### Further resources

- [Keep up to date with the latest developments](#)
- [Admissions Guide 2026 cycle](#)
- [Reminder of the following 2026 and 2027 key dates and deadlines](#)