International Application Service

AGENT PORTAL USERS GUIDE

Updated September 18, 2019

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Gaining Access to the Agent Portal

Register your Account

1. When you have been granted access to the agent portal for the first time, you will receive the email below. Click the 'Please create an account' link to begin registering your account.

FIRST LOGIN OR NEW AGREEMENT WITH A NEW COLLEGE

Demo College 1 <no_reply@uat.ocas.ca>
A New Account has been created for you on Ontario Colleges International Agent Portal!

Mary Nunez

You forwarded this message on 2017-10-06 3:02 PM.

Dear Mary Nunez,

Demo College 1 has granted you access to the Ontario Colleges International Agent Portal!

Please create an account and follow the instructions in order to complete the registration of your account.

Once you have completed your registration, you will have access to submit and manage applications for this college.

This is an automated email. Please do not reply to this message.

Please contact Demo College 1 if you have any further questions or need help getting started.

Ontario Colleges 60 Corporate Court
Guelph, Ontario, Canada N1G 5J3 Email: Service@ocas.ca

2. Click the 'Sign up now' link under the 'Sign In' button.

Register your email address

3. Type the email address of which you received the invitation into the 'Email Address' field.

Verify your email address

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4. Click the 'Send Verification Code' button. When the email is sent, a new 'Verification code' field will appear.
5. Check your email for the verification email. If your code does not come through, please check your junk folder.
6. Enter the code into the 'Verification code' field, and click the 'Verify Code' button.
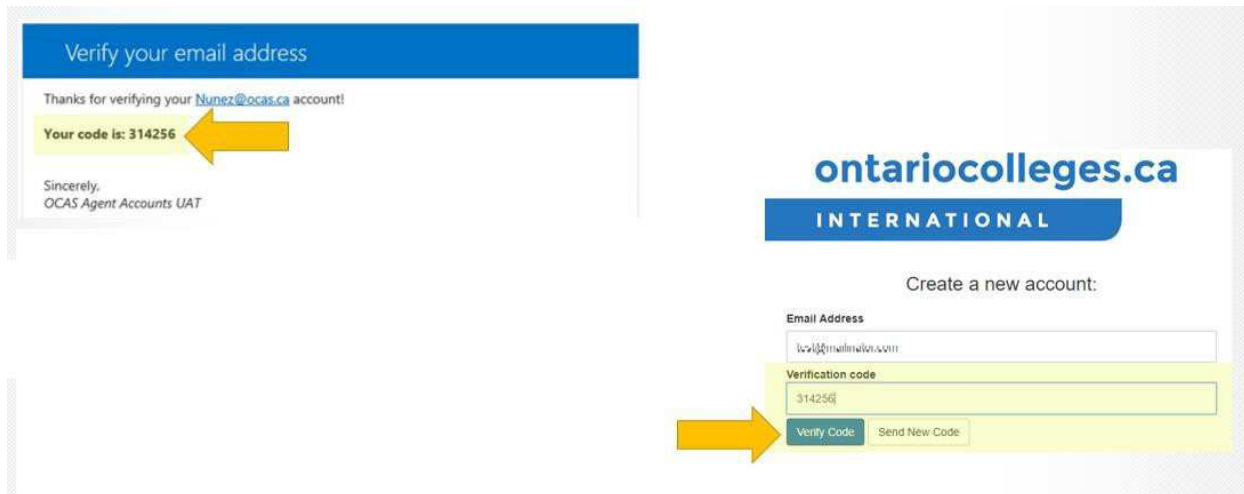
Create password and display name

7. Create a new password that has:

   • Between 8 and 16 characters in total.

   • At least three of the following:

     • a lowercase letter (a-z),

     • an uppercase letter (A-Z),

     • a number (0-9),

     • at least one of these special characters:
       @ # $ % ^ & * - _ + = [ ] { } | \ : ' , ? / ` ~ " ( ) ; .

8. Enter a display name for your account.

9. Click the 'Create' button.

Log in to the Agent Portal

Follow the steps below to sign into an existing account.

If you have forgotten your password, refer to the section Reset forgotten password.

If you need to register a new account, refer to the section Register your Account

1. Go to https://international.ontariocolleges.ca/agent.

2. Enter the email address you supplied to the college to login and password you chose while registering your account.

3. Click on the 'Sign In' button.

Change my password

Access my account details

This guide shows you how to change your password after you have signed into the system. If you have forgotten your password, please refer to the section Reset forgotten password.

1. Sign into the agent portal. If you are not sure how to do this, please refer to the section Log in to the Agent Portal.

2. Click on the initial icon on the top right corner of your screen to access your account details

3. Click on the 'My Account' button.

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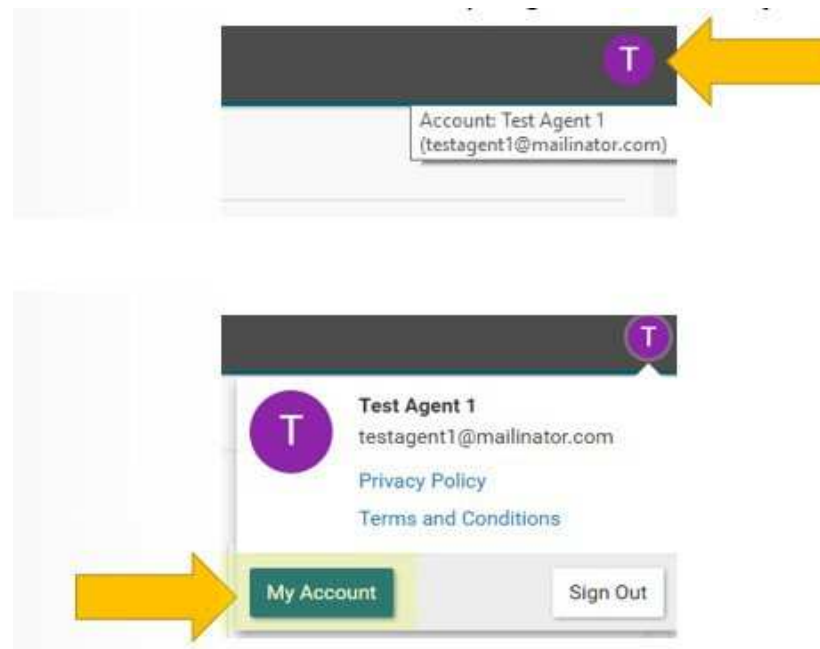
Change password when signed in

4. You will be redirected to a new page to manage your account. Click on the 'Change Password' link.

Verify your email address

5. Type in your email address in the 'Email Address' field.

6. Click the 'Send Verification Code' button. When the email is sent, a new 'Verification code' field will appear.


Enter the verification code

7. Check your email for the verification email. If your code does not come through, please check your junk folder.

8. Enter the code into the 'Verification code' field, and click the 'Verify Code' button.

9. Click the 'Continue' button.

10. Create a new password that has:

- Between 8 and 16 characters in total.

- At least three of the following:

    - a lowercase letter (a-z),

    - an uppercase letter (A-Z),

    - a number (0-9),

    - at least one of these special characters:
      @ # $ % ^ & * - _ + = [ ] { } | \ : ' , ? / ` ~ " ( ) ; .

11. Click the 'Create' button.

Reset forgotten password

Change password when not signed in

1. Go to https://international.ontariocolleges.ca/agent.

2. Enter the email address you supplied to the college to login.

3. Click on the 'Forgot your password?' link.

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Sign in with your existing account:

Email Address

nunez@ocas.ca

Password   Forgot your password?

Sign In

Don't have an account? Sign up now

by OCAS

You will be redirected to a new page to change your password.

4   First, type in your email address in the 'Email Address' field.

5   Click the 'Send Verification Code' button. When the email is sent, a new 'Verification code' field
     will appear.

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Password Reset

Email Address

Send Verification Code

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Password Reset

Verification code has been sent to your inbox. Please copy it to the input box below.

Email Address

test@test.com

Verification code

Verify Code   Send New Code

Enter the verification code

6. Check your email for the verification email. If your code does not come through, please check your junk folder.

7. Enter the code into the 'Verification code' field, and click the 'Verify Code' button.

8. Click the 'Continue' button.

9. Create a new password that has:

    1. Between 8 and 16 characters in total.

    2. At least three of the following:

        1. a lowercase letter (a-z),

        2. an uppercase letter (A-Z),

        3. a number (0-9),

        4. at least one of these special characters:
           @ # $ % ^ & * - _ + = [ ] { } | \ : ' , ? / ` ~ " ( ) ; .

10. Click the 'Create' button.

Request a new Agent Portal Account, or Remove an Agent Account

Contact OCAS Service@ocas.ca to add a new Agent Portal account

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Creating and Submitting an Application

1. Log in to your account. If you are not sure how to do this, please follow the section Log in to the Agent Portal section.

2. From the Dashboard view, click the 'New Application' link on the left.

3. Next, click the 'New Applicant' button on the main screen
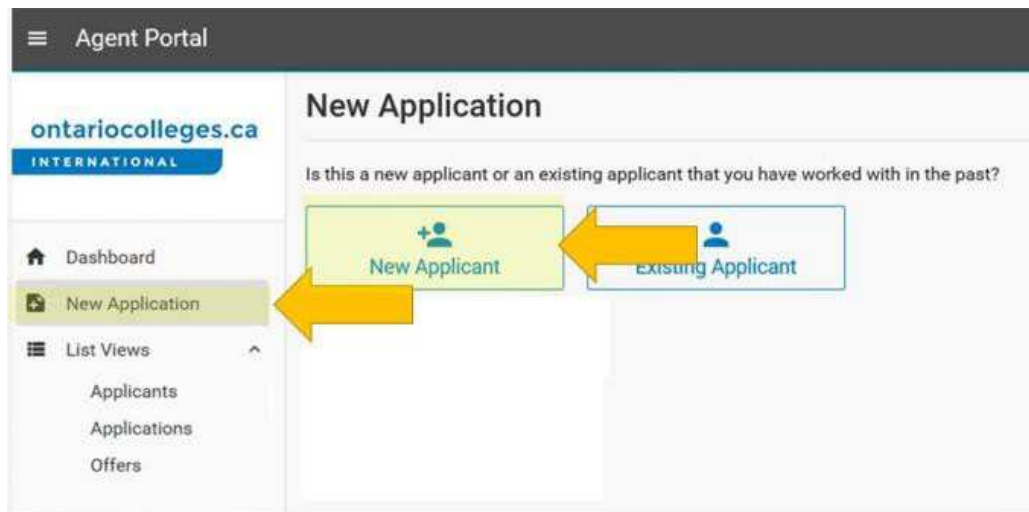
New Applicant Details

4. Fill out the Applicant's personal information, including:

- First Name
- Last Name
- Date of Birth
- Email Address
- Current Status in Canada
- Primary Country of Citizenship
- Passport Number

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New Application

Is this a new applicant or an existing applicant that you have worked with in the past?

+👤 New Applicant	👤 Existing Applicant

New Applicant

Before we get started, tell us a bit about the applicant.

First Name

John

Last Name

Smith

Date of Birth

1998-11-29 📅

Email

AdhusDarsh@mailinator.com

Current Status in Canada ❓

No status in Canada ⌄

Primary Country of Citizenship

India ⌄

Passport Number

J8349854

Continue

5. Click the 'Continue' button.

> ⚠
> ➢ Please enter the applicant's name exactly as it is shown on their Passport
> ➢ It is possible to define only a first name or only a last name (in this case, leave the other name field blank)
> ➢ Names written in either all capital or all lower-case letters will be automatically corrected to the correct case.

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Handling a Duplicate Applicant

If the applicant already exists in the list for your Agency, it is possible that you will get a Duplicate Applicant warning page as shown below:

If a matching applicant name (and information) is found, select this Applicant from the list in order to continue. Select Continue if you wish to proceed with creating a new applicant profile.

If a matching applicant is not found at your Agency, it is possible that the following Duplicate Applicant warning may also appear:

If this happens, ask the applicant whether they have applied to college with another agency or on their own.

- If the applicant confirms they have already started an application or if they don't know, ask the applicant to contact the college and Close any previous applications. The applicant can also request a Change of Agency for any Open applications. The applicant must contact the College in order to process this request.
- If the duplicate is an error, please click the 'Continue' button.

> ⓘ ➤ Duplicate Applications create challenges for college admissions staff and slow down the application processing time.
> Please avoid creating duplicate applications wherever possible.

Select a College

1. You will see a list of Available Colleges for this applicant. Click on the college you would like to apply to.

You will only be able to view the colleges using our system that you have a current agreement with. If you would like to apply to a college you don't currently have an agreement with, please contact that college's International department to learn more.

Personal Information

The next step in the application process is the Personal Information page, as shown below

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Basic Information

1. Enter the Applicant's legal name as it appears on their official documentation.
2. Enter the Applicant's Title (for example: Mr, Dr, or Miss) if it appears on their official documentation.
3. Enter the Applicant's First Name, also known as Given Name.
4. If needed, enter the Applicant's Middle Name; use the 'Add Another Middle Name' button to add any additional Middle names if they appear on their official documentation.
5. Enter the Applicant's Last Name, also known as Family Name or Surname.
6. If needed, enter the Applicant's Suffix.

Application for Yep Abbott (Draft)

Personal Information

Basic Information

Please provide your **legal name** as it appears on your official documentation.

Title (optional)
Select a title...

First Name
Yep

Middle Names (optional)
Tobias ✕
Maximus ✕
+ Add Another Middle Name

Last Name
Abbott

Suffix (optional)
JR

➢ Please enter the applicant's name exactly as it is shown on their Passport
➢ It is possible to define only a first name or only a last name (in this case, leave the other name field blank)

7. Confirm that the name is the same as what appears on legal documentation. We recommend physically checking the Applicant's official documentation. Once this information is correct, click 'Yes'.

Legal Name: **Yep Tobias Maximus Abbott**

The above name is the same as what appears on my legal documentation.

Yes   No

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8. Confirm the Applicant's Date of Birth that was previously entered. 9. Select Applicant's Country of Birth. 10. Select the Applicant's Gender identity. 11. Select Applicant's First Spoken Language (Mother Tongue) **Citizenship** 1. Confirm the applicants Current Status in **Canada** Status in Canada: • Select No Status in Canada if the applicant intends on applying for a visa/study permit • Select Study Permit if the applicant is already in Canada on a Study Permit (A copy of the applicant's study permit will need to be required) • Select other options as necessary 2. Confirm the Applicant's Citizenship information that was previously entered. 3. Confirm Applicant's Passport Number	Date of Birth 1998-11-29 Country of Birth India Gender ● Male ○ Female ○ Other Gender Identity First Language Spoken (Mother Tongue) Hindi Citizenship Current Status in Canada ⃝ Study Permit ⊙ You will be required to provide proof of your valid study permit Primary Country of Citizenship India Passport Number J8349854
Applicant's Address 1. Enter the Applicant's mailing address. You may be required to add additional information such as State. Enter information for all fields that appear red in color. Verify with the Applicant that they can obtain mail that is sent to this address. 2. If the Applicant currently lives at this address, select the 'Yes' button to the question 'Is your current address the same as your mailing address?'. 3. If the Applicant lives at a different address, select the 'No' button and enter their current address.	Address Please provide the **applicant's mailing** address in the same order as it appears on their passport. Do not use all uppercase (capital) letters or all lowercase letters. An example of a valid address is provided below: *Street Address:* HNO 329 Block 16 Hauz District *Apartment # (Optional):* B6 *City:* Mumbai Street Address Street Address Apartment # (Optional) Apartment # City City Country Select a country... Postal / ZIP Code (Optional) Postal / ZIP Code Is the applicant's current address the same as the applicant's mailing address? Yes No Please provide the **applicant's current** address. Street Address Street Address

Applicant's Contact Information 1. Enter at least one phone number for the applicant. 2. You may enter any additional phone numbers or email addresses where the Applicant would prefer to be contacted. 3. Enter all needed details for an Emergency Contact for your Applicant. 4. Click the 'Save + Continue' button.	

> ➤ If any information is missing or incomplete, you will be returned to the Personal Information page and missing fields will appear red in color.
> Fill out all fields that are red. Once all fields are filled out correctly, you will proceed to the next step.

Provide Agent

1. Click the 'Yes' button under the question 'Are you working with an Agent?'

2. Your Agency will be pre-selected from the dropdown.

3. Review the Authorization statement with the Applicant.

   With their acknowledgement, check off the "I hereby authorize my agent to act on my behalf in all matters concerning my application" statement.

4. Click the Save and Continue button.

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Program Selections

1. Select the option that best describes the Applicant's English proficiency.

Once selected, the 'First Program Choice' box will appear below.

2. Select the **Term** when the Applicant would like to begin study. Be certain to account for time to acquire visas and relocate to the program destination, if applicable.
   - Fall: Programs that start between August – November
   - Winter: Programs that start between December – March
   - Spring: Programs that start between April – July

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3. Select the **Credential Type** the Applicant prefers.
   - Any Credential Type: Select this to view all programs.
   - Degree: Either semesters (four years) or study.
   - Ontario College Diploma: Four semesters (two years) of study.
   - Ontario College Advanced Diploma: Six semesters (three years) of study.
   - Ontario College Certificate: Two semesters (one year) of study.
   - Ontario College Post-Graduate Certificate: Require previous post-secondary certificate or diploma for admission: Length varies
   - Other: Length varies.
4. Select the Program Name of the program the applicant would like to apply to.
5. Once a program is selected, its availability at various campuses will be shown below. Select the desired campus and start date for the program. If the selected program is offered at multiple campuses and start dates (referred to as an intake), you will see multiple options; place a check mark √ beside the desired campus and start date combination.

First Program Choice

Term

Winter 2018 ▾

Credential Type

Any Credential Type ▾

Program Name

Global Hospitality Management ▾

Select a campus and start date:

	Campus	Start Date	Availability
☐	● Main	Jan. 8, 2018	✅ Open
☐	● South Campus	Jan. 9, 2018	🕒 Waitlisted

> ➢ You may select a program only if it has a Campus + State Date with an Open or Waitlisted availability. You may not apply to a Closed intake for a program.

6. If the Applicant would like to add another program right away, you may click the 'Add Another Program' button and follow the same steps to add additional programs.
7. Once you have added at least one program, click the 'Save + Continue' button.

Education

1. In the Schooling section, click the 'Add School' button

> ℹ️ ➢ You must define at least one school item for the applicant, in order to submit the application.

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1. In the pop-up window, fill out the details of the Applicant's previous and current schooling. The following is a description of Credential Received options:
   - Secondary options are Senior Secondary / High School Graduation Diploma
   - College options are Diploma, Certificate, Graduate Certificate, or Degree
   - University options are University Degree, Master, Doctorate, Bachelors, or other
2. Click the 'Done' button.
3. Use the 'Add School' button to include any additional schooling information. We recommend including all relevant education background.
4. You may use the 'Edit' or 'Delete' buttons to the right of each school to modify details or remove schooling information from the Applicant's account.

New School ✕

Please provide as much detail as possible about this school.

School Type
Secondary ▼

School Name
Saint Elizabeth Secondary School

Country
United Kingdom ▼

Program (optional)
Program

Status
Completed ▼

Credential Received (optional)
Senior Secondary / High School Graduatio ▼

CANCEL   DONE

Schooling

Please provide details of your past and present high school, college and / or university education.

+ Add Another School

School	Country	Status		
Secondary: Saint Elizabeth Secondary School	United Kingdom	Completed	✎	✕

If English Proficiency Test Scores are available, enter them using the following steps.

1. In the English Proficiency Test Scores section, click the 'Add Test Score' button.

Application for Yep Tobias Maximus Abbott (Draft)
Education

Schooling

Please provide details of your past and present high school, college and / or university education.
+ Add School

English Proficiency Test Scores

Please provide your English proficiency test scores.
+ Add Test Score

Save + Continue

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2. In the pop-up window, fill out the details of the Applicant's test scores. If the applicant has a test date booked for their English Proficiency test, provide this in the Date of Completion field. 3. If available, add a detailed breakdown of test scores for Listening, Reading, Writing and Speaking. 4. Click the 'Done' button. 5. Use the 'Add School' button to include any additional schooling information. 6. You may use the 'Edit' or 'Delete' buttons to the right of each school to modify details or remove schooling information from the Applicant's account.	
7. Click the 'Save + Continue' button to move on to the next step.	

> ? ➤ Check each college's admission requirements to ensure that the college will accept the specified English Proficiency test type and scores.

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Supporting Documents

Proof of Citizenship

You must provide supporting documentation as evidence of the Applicant's citizenship.
Please make sure scans or photographs are of good quality and are easily readable.

1. In the 'Proof of Citizenship' section, click the type of document you will submit
2. An upload window will appear. You may drag and drop a document from your computer onto the upload window, or you may click the 'Select files(s)' area to select a document for upload
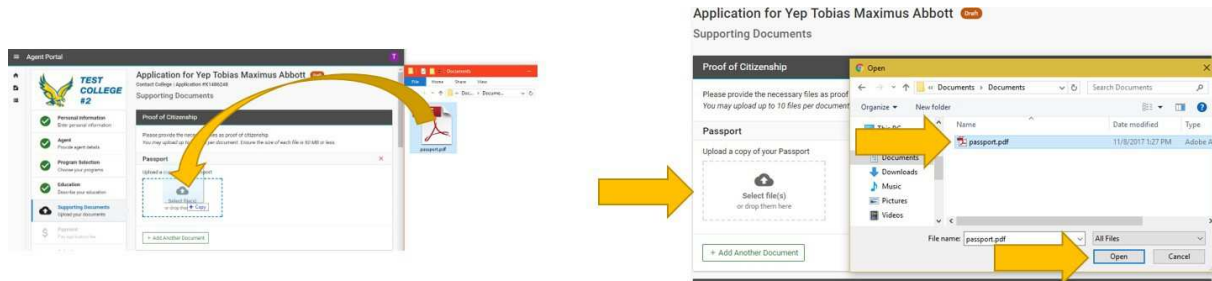
3. Use the 'Add Another Document' button to upload all relevant documents. Documents in accepted formats will appear in green. Documents in unaccepted formats will show an error. Make sure that all the documents you upload are accepted by the system
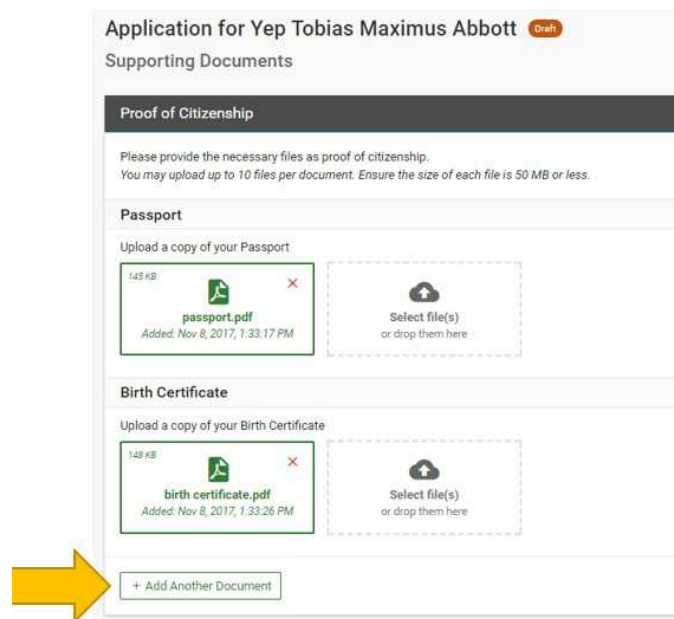
> ⚠ A Passport must be provided as a Proof of Citizenship document.

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Academic Documents

You must provide supporting documentation as evidence of the Applicant's previous schooling. Please make sure scans or photographs are of good quality and are easily readable. Note that you must declare the education before you are able to upload supporting documents.

1. In the 'Academic Documents' section under the relevant establishment, click the type of document you will submit.

2. An upload window will appear. You may drag and drop a document from your computer onto the upload window, or you may click the 'Select files(s)' area to select a document for upload.
3. Use the 'Add Another Document' button to upload all relevant documents.
   Documents in accepted formats will appear in green. Documents in unaccepted formats will show an error. Make sure that all the documents you upload are accepted by the system.

English Proficiency Test Scores

You may provide supporting documentation as evidence of the Applicant's English Proficiency test score results. Please make sure scans or photographs are of good quality and are easily readable.

1. In the 'Test Scores' section with the relevant test score name, click the type of document you will submit.

2. An upload window will appear. You may drag and drop a document from your computer onto the upload window, or you may click the 'Select file(s)' area to select a document for upload.

3. Use the 'Add Another Document' button to upload all relevant documents.
   Documents in accepted formats will appear in green. Documents in unaccepted formats will show an error. Make sure that all the documents you upload are accepted by the system.

Visa Document

You may provide supporting documentation as evidence of the Applicant's visa status.
Please make sure scans or photographs are of good quality and are easily readable.

1. In the 'Visa Documents' section with the relevant test score name, click the type of document you will submit.

2. An upload window will appear. You may drag and drop a document from your computer onto the upload window, or you may click the 'Select file(s)' area to select a document for upload.

3. Use the 'Add Another Document' button to upload all relevant documents.
   Documents in accepted formats will appear in green. Documents in unaccepted formats will show an error. Make sure that all the documents you upload are accepted by the system.

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Other Documents

You may provide any other supporting documentation relevant to the Applicant's application.
Please make sure scans or photographs are of good quality and are easily readable.

1. In the 'Other Documents' section, click the type of document you will submit.

2. An upload window will appear. You may drag and drop a document from your computer onto the upload window, or you may click the 'Select files(s)' area to select a document for upload.

3. Use the 'Add Another Document' button to upload all relevant documents.
   Documents in accepted formats will appear in green. Documents in unaccepted formats will show an error. Make sure that all the documents you upload are accepted by the system

4. Click the 'Save + Continue' button to move on to the next step.

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> **Is the Applicant Missing Required Documents?**
> ➤ The application can be saved as Draft state; this allows you to return to the Agent portal at a later date/time and upload the remaining documents, then Submit the application at that time.
> ➤ It's also possible to provide additional supporting documents after the application is submitted, such as Final Academic Transcripts or English Test Scores.

Referrals

If an applicant was referred by either a student at the college or an exchange partnership school they will be able to declare that on this page, which will allow the application fee to be waived.

Exchange Partnership School

1. If the applicant was referred through an exchange with a partner school lick the "Yes" button.
2. Select the name of the school the applicant is associated with from the drop down menu and click "Save + Continue"

Refer a Friend
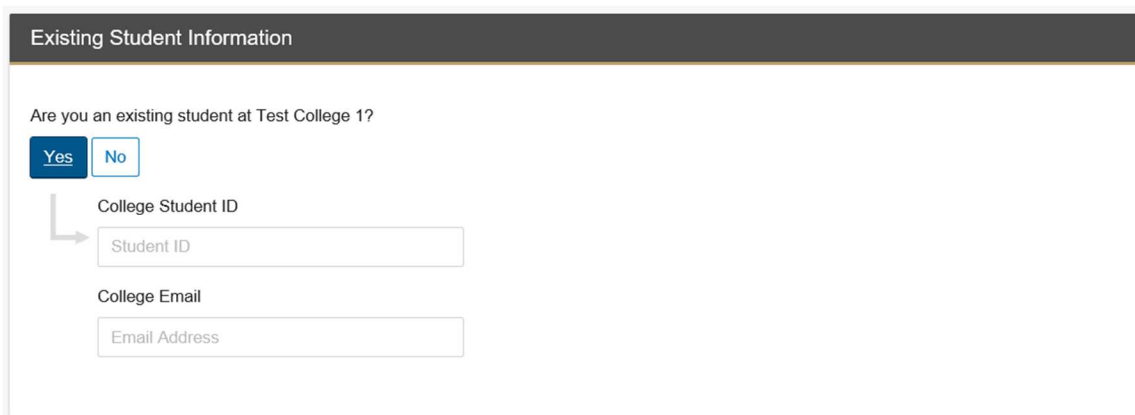
1. If the applicant was referred by a student at the college through a "Refer a Friend" program, select "Yes" under that section.
2. Enter the name of the referring student, their student ID and email address.
3. Click "Save + Continue."

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Existing Student Information

If the applicant attended the college previously they can enter that information here.

1. Click the "Yes" button.
2. Enter the applicant's college student ID and college email address.
3. Click "Save + Continue."
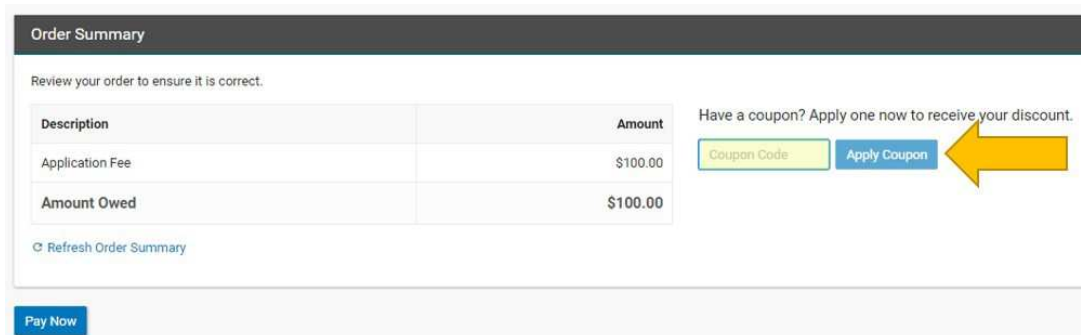
Payment of Application Fee

Review Order Summary and Apply Coupon Code

1. Review the Order Summary with the applicant.

   If there is an active Fee Waiver (as part of the agreement the Agency has with the particular college), then you will see the appropriate fee waiver reduction amount. No payment is required if the full application fee is waived.

2. If you have a coupon, enter the code in the Coupon Code box and click the 'Apply Coupon' button to receive a discount.

Initiate Payment

1. When you are ready to pay for the application, click the 'Pay Now' button.

2. On the pop-up window, click the 'Continue' button. You will be redirected to an external payment provider, Flywire, to complete the payment.

Order Summary

Review your order to ensure it is correct.

Description	Amount
Application Fee	$100.00
Amount Owed	**$100.00**

↻ Refresh Order Summary

Have a coupon? Apply one now to receive your discount.

[Coupon Code] [Apply Coupon]

[Pay Now]

Pay Application Fee   ✕

Once you have completed your payment through our external payment provider, select Continue to proceed with your application.

[CONTINUE]

Make Payment through Flywire

3. If the applicant has a flywire account sign in to complete the payment. If not, register a new account.
4. Complete and confirm the relevant payment information and click the 'Continue Payment' button.
5. If applicable, follow the instructions to complete the payment and click the 'Return to OCAS' button.

6. Once the payment has been made, Flywire must process it before you can submit the application.

7. When Flywire has processed the payment, the payment status will be changed to Guaranteed and you will be informed by email. Likewise, if the payment has been cancelled for whatever reason you will also receive an email notification.

8. After the payment status has been updated to Guaranteed, click 'Save and Continue.'

Review and Submit

1. Review the information to ensure accuracy and completeness and use the [Change] button at the top of each section to go back to an earlier section in order to make revisions or corrections.

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2. Scroll down this page to review the provided Program Selections, Education, English Proficiency, and Supporting Documents.
3. At the bottom of this page, check the box to agree to the terms and click 'Submit Application' button

3. You will see a confirmation message on the next page.
4. Click the 'Done' button to return to the Applicant dashboard

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How do I manage applicants?

View List of Applicants

1. Log in to your account. If you are not sure how to do this, please follow the _Login_ instructions.

2. From the Dashboard view, click the 'Applicants' link under 'List Views' on the left.

3. The list of Applicants will be displayed to the right.
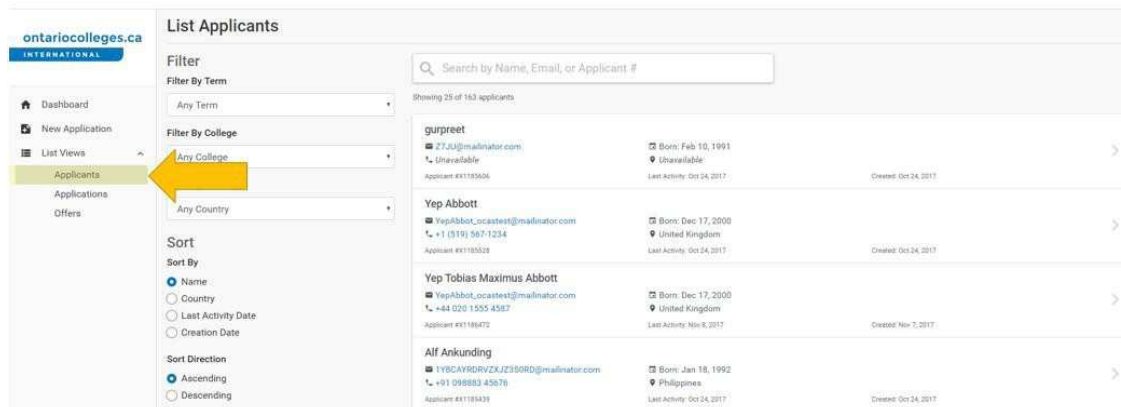
Search for an Applicant

4. At the top of the list, enter the Applicant's name, email address or applicant number.

5. The search results will appear below as the search term is being entered.
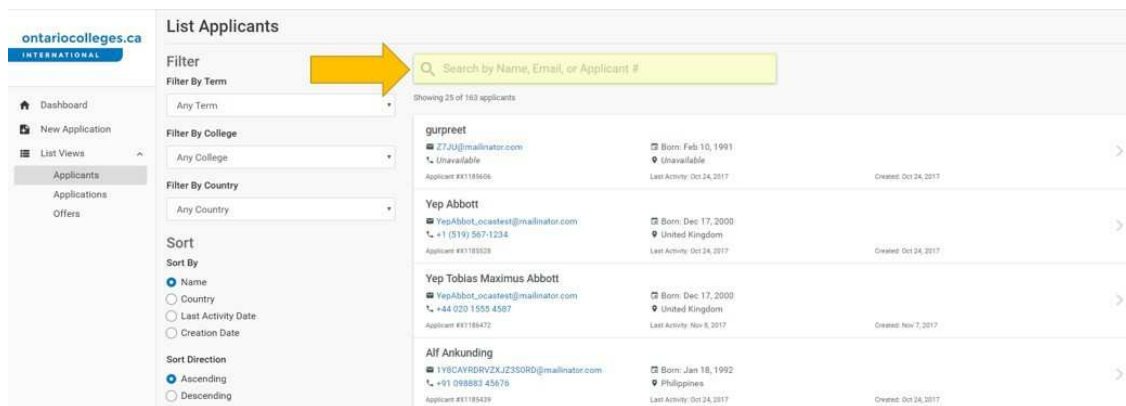
Filter the List of Applicants

6. Select the filter you would like to apply from the dropdowns to the left of the list. Applicants can be filtered by term, college or country.

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Sort the List of Applicants

7. Select how you would like the list to be sorted from the options to the left of the list. Applicants can be sorted by name (last name), country, last activity date or creation date and the list can be sorted in ascending or descending order.

View and Edit Applicant Information

1. Log in to your account. If you are not sure how to do this, please follow the section Log in to the Agent Portal section.
2. From the Dashboard view, click the 'Applicants' link under 'List Views' on the left
3. Click on the Applicant that you would like to view.
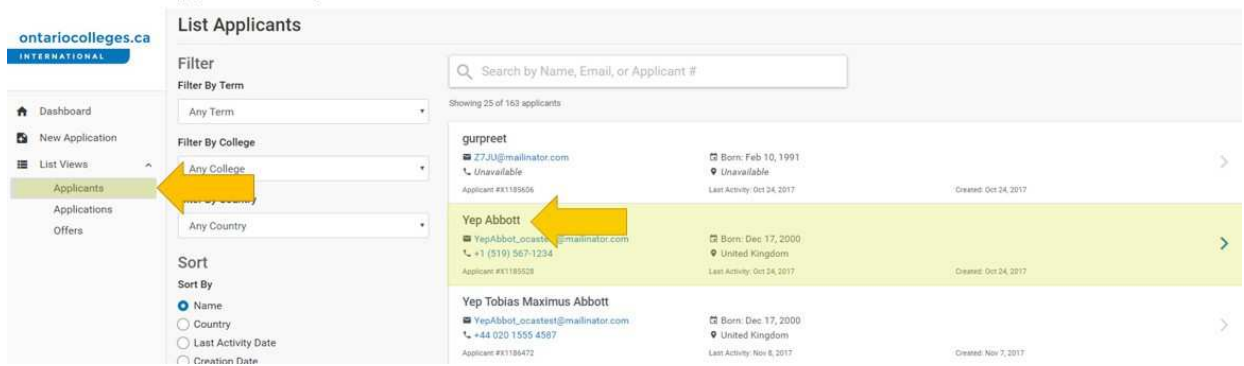
4. On the applicant dashboard click on the 'View Profile' button.

5. The applicant's profile information will be displayed on the next page.
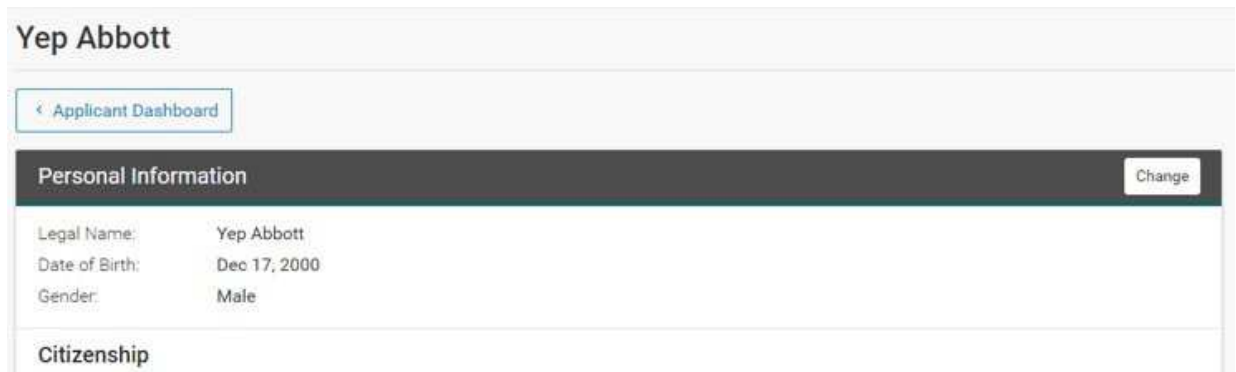
6. Click the 'change' button at the top right to edit the Applicant's information.

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Each applicant will be assigned a unique ID. This will appear in the List Applicants page and is also a searchable field.

How do I Manage Applications?

View List of Applications

1. Log in to your account. If you are not sure how to do this, please follow the section [Log in to the Agent Portal](#).

2. From the Dashboard view, click the 'Applications' link under 'List Views' on the left.

3. The list of applications will be displayed to the right

Search, Filter, and Sort the List of Applications

4. At the top of the list, enter the Applicant's name, email address, program or application number.

5. The search results will appear below as the search term is being entered

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6. Select the filter you would like to apply from the dropdowns to the left of the list. Applications can be filtered by term, college, country or status.

7. If the 'Review' status is selected, applications can also be filtered by program status

8. Select how you would like the list to be sorted from the options to the left of the list. Applications can be sorted by last activity date, submitted date or applicant name and the list can be sorted in ascending or descending order.

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The Filters and Sort direction can be Rest to defaults by pressing the Reset All button as shown below:

View and Edit Application Information

1. Log in to your account. If you are not sure how to do this, please refer to the instructions, section Log in to the Agent Portal.

2. From the Dashboard view, click the 'Applications' link under 'List Views' on the left.

3. Click on the application that you would like to view

4. When the application is in 'Draft' status, sections of the application can be updated by clicking the 'Change' button at the top right of each section.

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> **ⓘ**
> **Adding another Program Selection to an Application**
> ➢ When the application is in 'Draft' state, you can make any changes to the program selections.
> ➢ Once the application is in 'Review' state, the program selections cannot be modified and the program selections cannot be re-ranked.
> ➢ A **new** program may be added to the application, however only after
>   o The college has made a decision of Declined or Waitlisted on an existing program selection; or
>   o An Offer has been made on a program selection, and the Offer state is at Offer Revoked, Offer Declined, or Withdrawn Acceptance
>   o The application has only 1 or 2 program selections
> ➢ When the application is at 'Closed' state, no new program selections can be added

Each application will be assigned a unique ID. This will appear in the List Applications page and is also a searchable field.

The applicant's Personal information, Education, and Supporting Documents can be modified after the application is submitted. Select the [Change] button to load the appropriate page and make the modifications then click Save.

Responding to Applications that "Need More Information"
During the initial review of the application, the college may find errors or require additional information. When this happens, the state will be set to "Needs More Information" and you and the applicant will receive an email notification. Follow the steps below to provide the corrections or missing information.

Locate the Application
1. Log in to your account. If you are not sure how to do this, please follow the section Log in to the Agent Portal.

2. Click the 'Applications' link under 'List Views' on the left.

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3. Filter by Application Status = 'Needs More Information' as shown below.
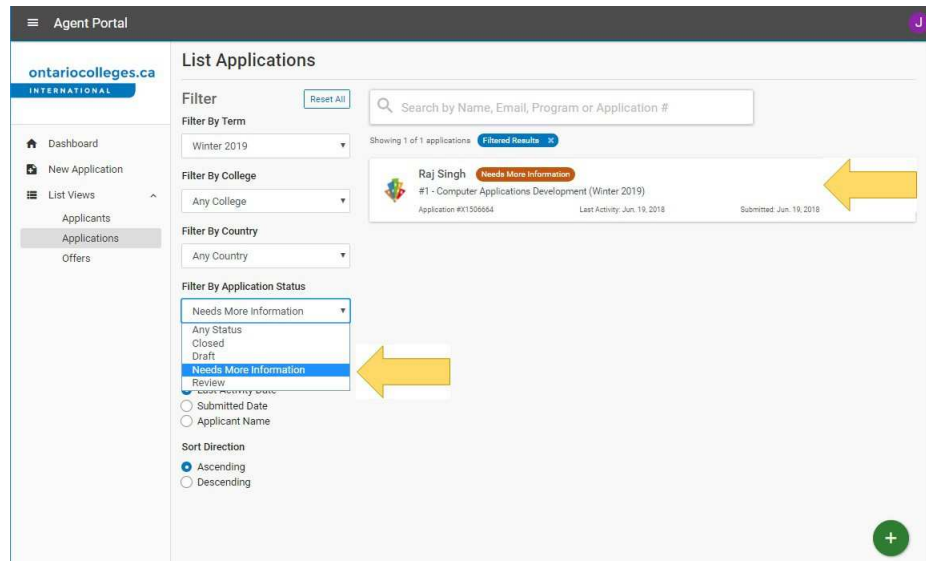
4. Enter the applicant's name or the application ID into the search bar, in order to find the appropriate applicant. Select this item from the list.

Review the Instructions

1. On the Application Details page, you will see a section at the top, 'Additional Information Required', along with the notes and instructions from the college. The college may request corrections to: Personal Information, Education, or Supporting Documents.
    The example below shows corrections for Supporting Documents
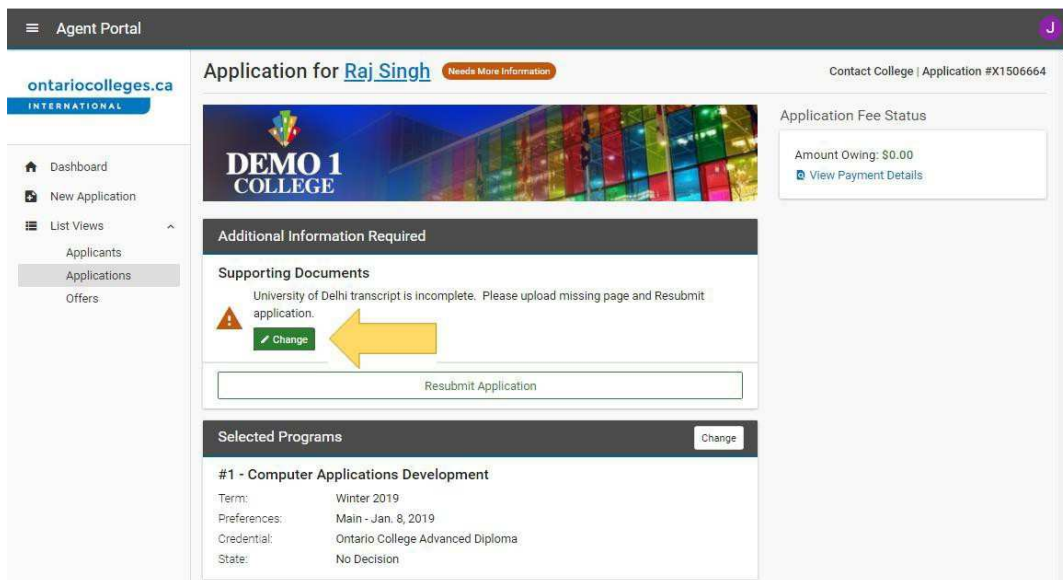
2. Read the instructions carefully, then click the 'Change' button.

Make the Necessary Corrections

1. The appropriate page in the application will appear – the example below shows the Supporting Documents. Following the instructions provided above, locate the necessary Supporting Document that requires the missing information.

2. In the 'Academic Documents' section under the relevant establishment, click the type of document you will submit.

3. An upload window will appear. You may drag and drop a document from your computer onto the upload window, or you may click the 'Select files(s)' area to select a document for upload

4. Scroll to the bottom of the page and click 'Save' button to save changes.

Re-submit application

1. On the Application Details page, click on 'Resubmit'

After Resubmit, the application state will change to 'Resubmitted'

View Application Status

1. From the Dashboard view, click the 'Applications' link under 'List Views' on the left.
2. The application status is displayed next to each application in the list. Applications can either be in 'Draft', 'Review' or 'Closed' status.

The College will make a Decision on one or more Program Selections included on the application:

- Waitlisted can be issued when there are no seats available in the program. There is no guarantee that the college will issue an offer when the applicant is put on the waitlist.
- Declined may be used when there is no intention to further pursue that program selection on the application. Furthermore, in some cases, Declined may be used to indicate when a decision has been made on other program selections
- Pre-Admitted, and
- Offered

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Withdraw or Cancel an Application

1. From the Dashboard view, click the 'Applications' link under 'List Views' on the left.
2. Search for the application you wish to withdraw or cancel and click on the application.
3. At the top right of the screen click the 'Contact College' link and contact the relevant college through the contact details provided in the pop-up window.
4. Provide the appropriate Application ID (and Applicant's Name) to the college, for the application you would like to Close.

How do I Manage Offers?

Search, Filter, and Sort the List of Offers

1. From the Dashboard view, click the 'Offers' link under 'List Views' on the left.
2. The list of offers will be displayed to the right.

3. At the top of the list, enter the applicant's name, email address, program or application number.
4. The search results will appear below as the search term is being entered.

5. Select the filter you would like to apply from the dropdowns to the left of the list. Offers can be filtered by term, college, country, status or type.

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6. Select how you would like the list to be sorted from the options to the left of the list. Offers can be sorted by offer expiration date, offered date, program start date or applicant name and the list can be sorted in ascending or descending order.

View Offer Status

1. From the Dashboard view, click the 'Offers' link under 'List Views' on the left.
2. The offer status is displayed next to each offer in the list. Offers can either be in 'Pre-Admitted', 'Offered', 'Accepted', 'Declined', 'Paid', 'Pre-Registered', 'Revoked' or 'Withdrawn' status.

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The college may issue an offer on:

- A program selection that was included on the application
- An Alternate Offer (different program, or different intake)
- An ESL/EAP Program (English Proficiency)

Some colleges may also include a "Future Program / Intake" details on the Letter of Acceptance.

View Letter of Acceptance

1. From the Dashboard view, click the 'Offers' link under 'List Views' on the left.
2. Select the offer you wish to view

3. On the offer details page, click the 'View Letter of Acceptance' link.
4. If a previous letter of acceptance was received, a 'View Previous Letters' link will appear.

Offers with Future Intakes

Issue "1 + 1 (or English + Future Program)" in the cases where the Offer Letter contains an offer on one program, and a "consideration" for a second or future program, based on successful completion of the first program. This is commonly used when the student must complete an English Proficiency Program (EAP) as a condition of starting studies in their full-time program selection

Accept a Pre-Admittance
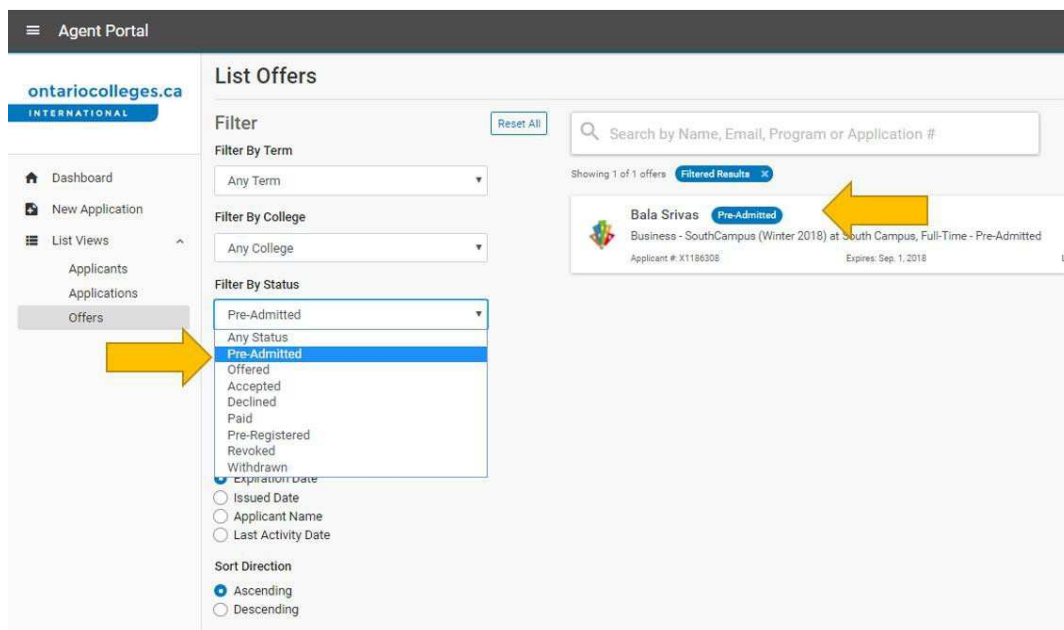
Some colleges may issue a "Pre-Admitted" letter before a standard Letter of Acceptance (Offer Letter) is provided. The applicant must satisfy the specified conditions in the Pre-Admit letter before they receive a standard Offer Letter. The conditions could be a deposit payment or completion of specified English Proficiency or Academic requirements.

The Pre-Admit Letter looks similar to the standard Offer Letter, however with one main distinction: Across the top, there is an indication "THIS LETTER CANNOT BE USED FOR VISA PURPOSES". The applicant cannot use this letter to apply for a visa/study permit. However, the content and format of the letter is adequate to allow the applicant to apply for financial aid (such as a bank load) to assist with their application. A sample of the Pre-Admit letter is shown below.

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LETTER OF ACCEPTANCE
THIS LETTER CANNOT BE USED FOR VISA PURPOSES

Date of Issue: April 02, 2018

PERSONAL INFORMATION

Family Name: Hai-xia	CAQ: No
Given Name: Ling	Student's Full Mailing Address: Floor No. 6 No 6 Haidian Central Street #92 Beijing , Beijing 419101, China
Date of Birth: March 14, 1984	
Applicant ID #: X1186224	Referring Agent (if applicable): _Demo Agency 8 China-Beijing

INSTITUTIONAL INFORMATION

Name of Contact: Demo College 1, Name, Demo College 1, Title Phone: +1 888 555 5555 Email: demo.college1@mailinator.com	Full Name and Address of Institution: Demo College 1 123 Main St Cape Canaveral, Florida

The status will show as "Pre-Admitted" in your Agent Portal. A Pre-Admit letter can contain conditions, just like an Offer Letter. Once the applicant has satisfied the conditions of the Pre-Admit letter, there is an option to convert the Pre-Admit state to a standard "Offer", and the applicant will receive a standard Offer Letter to facilitate the rest of their application.

1. On the List Offers page, Filter by Status = 'Pre-Admitted'
2. Select the item from the List that contains the 'Pre-Admitted' state

3. On the Pre-Admittance details page, click the 'Accept Pre-Admittance' button.
4. A confirmation message will appear. Read the information provided and click the 'Continue' button.

Once the college acknowledges that the necessary conditions of the Pre-Admit have been addressed, the college will issue a standard Offer (with an updated Letter of Acceptance).

Accept an Offer

1. On the offer details page, click the 'Accept Offer' button.
2. A confirmation message will appear. Read the information provided and click the 'Continue' button to confirm acceptance of the offer

Both the Agent and Applicant can Accept an Offer, Decline an Offer, or Withdraw Acceptance of an Offer.

Withdraw an accepted offer

1. From the Dashboard view, click the 'Offers' link under 'List Views' on the left.
2. Select the offer you wish to view.
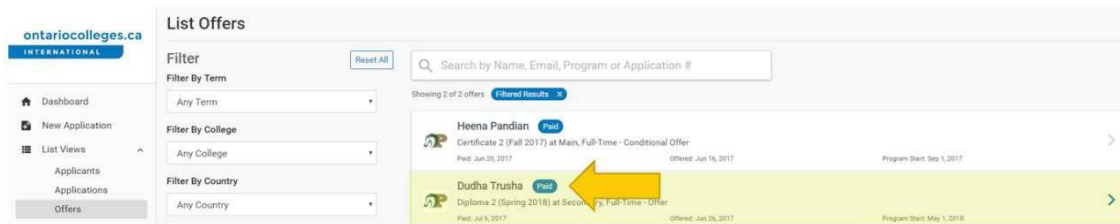
3. On the offer details page, click the 'Withdraw Acceptance' link.
4. A confirmation message will appear. Read the information provided, select the withdraw reason from the dropdown and click the 'Continue' button to confirm withdrawing acceptance of the offer.
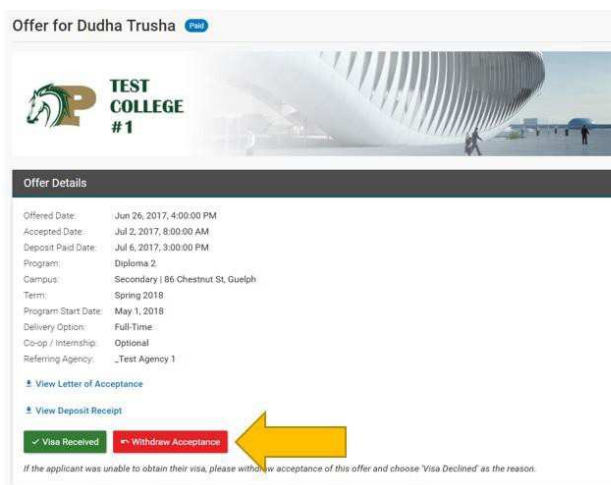
Decline an Offer

1. On the offer details page, click the 'Decline Offer' button.
2. A confirmation message will appear. Read the information provided and click the 'Continue' button.

Upload Documents for Conditional Offers

1. From the Dashboard view, click the 'Offers' link under 'List Views' on the left.
2. In the 'Filter by Type' dropdown select 'With Conditions' to view all conditional offers and select the offer you wish you view.

3. On the offer details page note the offer conditions at the bottom.
4. Click on the Applicant's name at the top to go to the Applicant dashboard page.
5. On the Applicant dashboard page click the 'View Profile' button.

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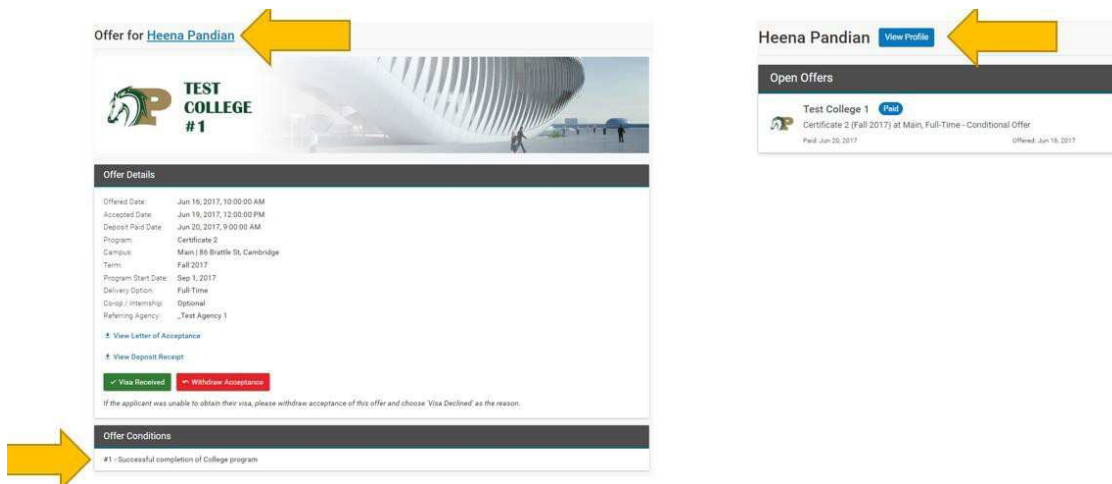
6. On the Applicant profile page, scroll down to the bottom and click the 'Change' button at the top right of the 'Support Documents' section.

7. In the relevant section, click the 'Add Another Document' button then select the relevant file from your computer to upload.
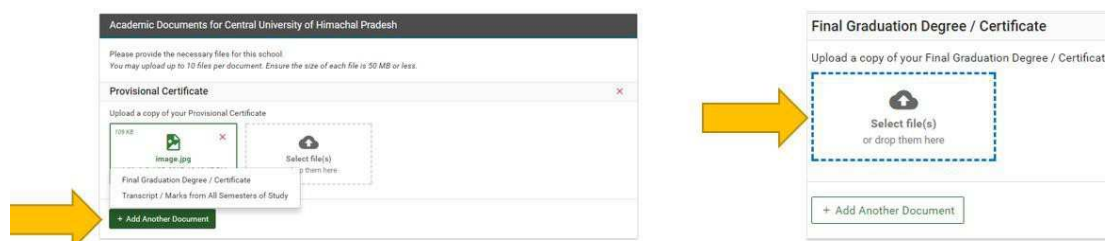
View deposit/payment receipt

Once the college receives the necessary payment (deposit amount or tuition amount as defined in the Letter of Acceptance), the Offer state will change to "Paid". A payment receipt is available for download in the portal in order to assist with visa/study permit application.

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1. From the Dashboard view, click the 'Offers' link under 'List Views' on the left.

2. Select the Offer you wish to view. Note: the offer status must be 'Paid' or 'Pre-Registered' to view deposit receipt.
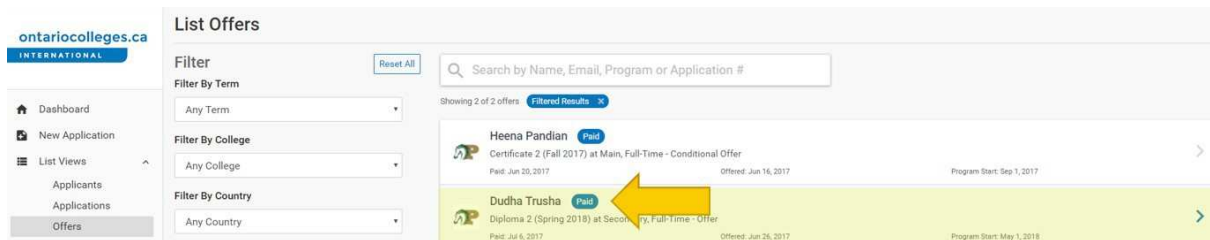
3. On the offer details page, click the 'View Deposit Receipt' link.
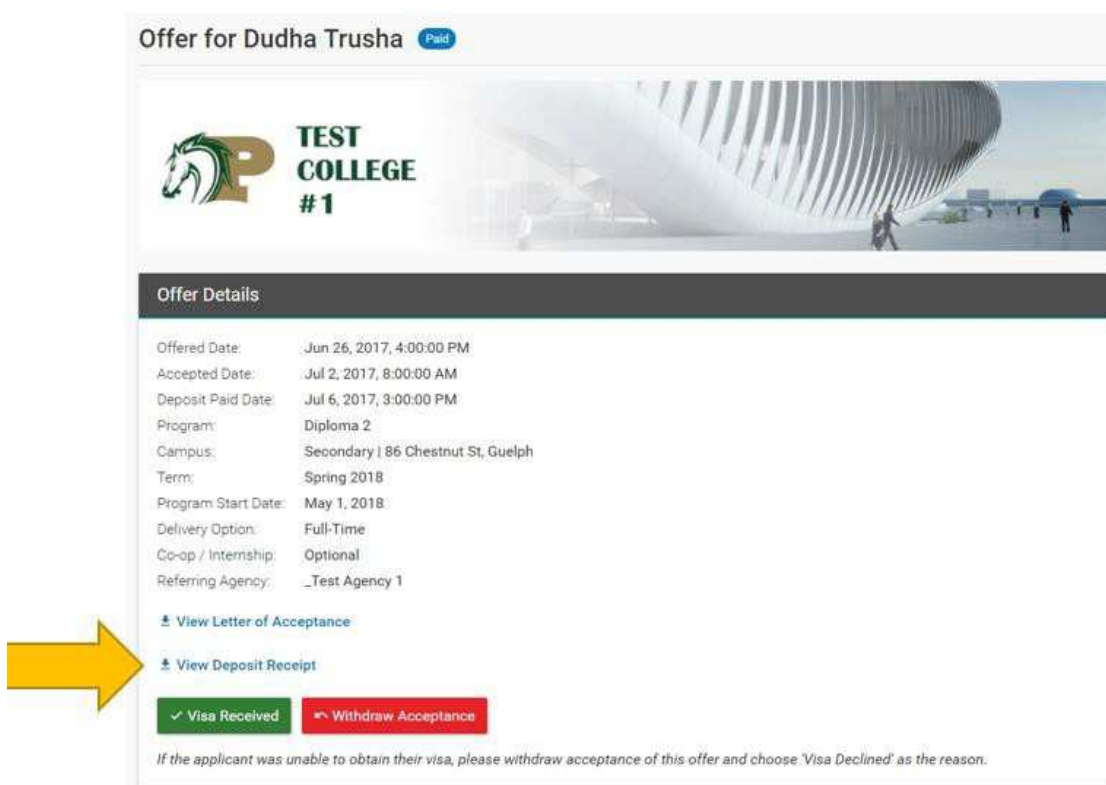
Upload Visa/Study Permit

When the applicant's Visa/Study Permit application is approved, notify the college through the portal following the steps below.

1. From the Dashboard view, click the 'Offers' link under 'List Views' on the left.
2. In the search box enter the name of the Applicant you wish to find and select the offer you wish to view.
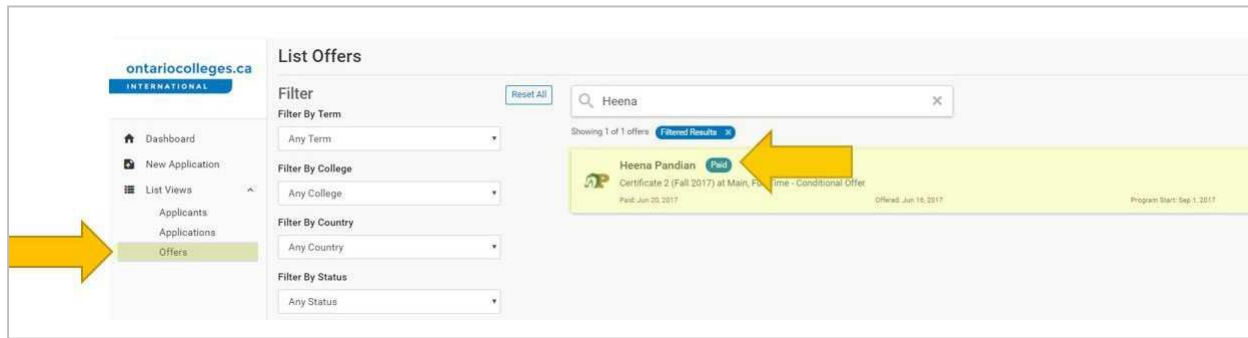
3. On the offer details page click the 'Visa Received' button.
4. A confirmation message will appear. Read the information provided and click the 'Continue' button to confirm that you have received the necessary visa documents for the offer.
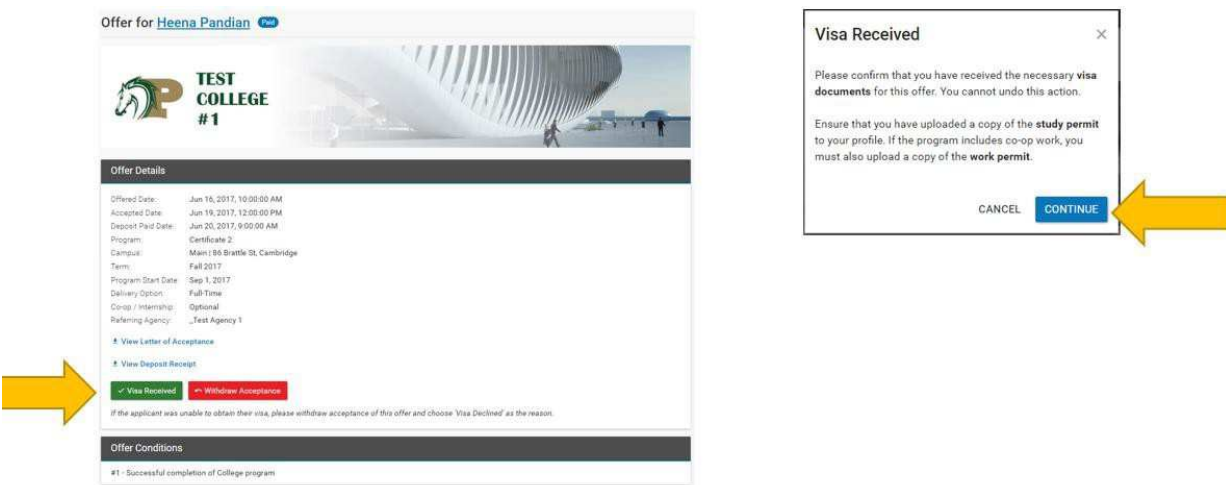
5. A message will appear at the top of the screen prompting you to upload a copy of the Applicant's visa documents.

6. Click the 'Upload Visa Documents' button to go to the Applicant's profile page.
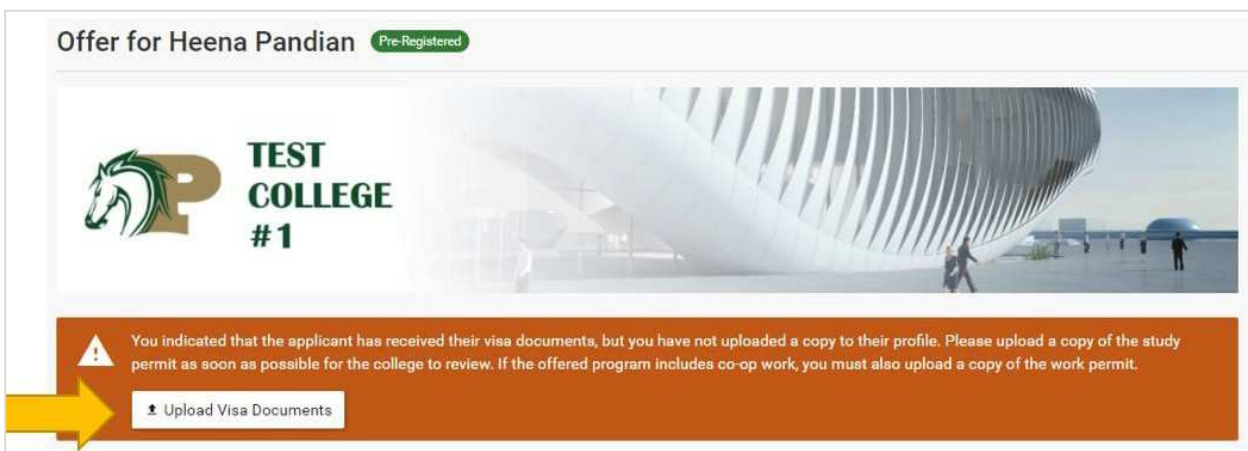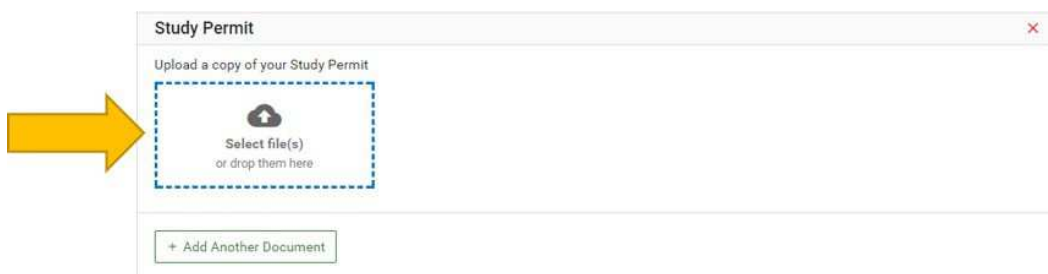
7. On the Applicant profile page, scroll down to the 'Visa Documents' section and select the visa document that you wish to upload.

8. Select the relevant file from your computer to upload.

9. Click the 'Save + Continue' button.

The Offer status will update to "Pre-Registered".

Visa Declined

In the event the Applicant's Visa/Study Permit application is Declined (or not received on time for the start of classes), the Agent or Applicant should notify the college using the Withdraw Acceptance button in the Offer Details page.

1. From the Dashboard view, click the 'Offers' link under 'List Views' on the left.
2. In the search box enter the name of the Applicant you wish to find and select the offer you wish to view.
3. Select Withdraw Acceptance and the following window will appear:

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Withdraw Acceptance of Offer ✕

Please indicate why you are withdrawing acceptance of this offer.
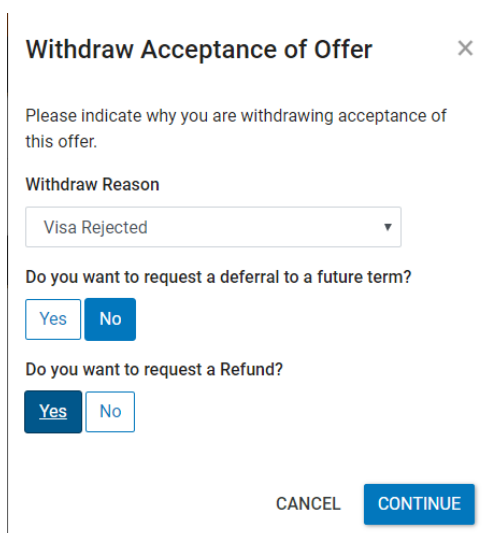
Withdraw Reason

Visa Rejected ▾

Do you want to request a deferral to a future term?

Yes   No

CANCEL   **CONTINUE**

4. In the Withdraw Reason, select "Visa rejected". You will then be asked if you want to request a deferral, if you say "Yes" you will be taken to the deferral request page when you click continue, if you select "No" you will see a question asking if you want to request a refund.

Withdraw Acceptance of Offer ✕

Please indicate why you are withdrawing acceptance of this offer.

Withdraw Reason

Visa Rejected ▾

Do you want to request a deferral to a future term?

Yes   No

Do you want to request a Refund?

Yes   No

CANCEL   **CONTINUE**

5. If you select "Yes" you will be taken to the Request Refund page when you click continue. If you select "No" the offer state will be changed to "Withdrawn" and you will have the option to request a refund or deferral later as shown below:

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Offer Revoked

A College user may Revoke the offer for various reasons.

- Acceptance Deadline Passed
- Applicant Did Not Show Up
- No Seats Available in the Selected Intake
- Payment Not Received
- Visa Not Received

- Other (enter user-defined reason)

Both you and the applicant will receive and email notifying you if an offer has been revoked.

No further actions are available when an offer shows as 'Revoked'.

How do I Stay Informed?

The Dashboard provides a quick "at a glance" overview of critical information for your Agency. The Dashboard consists of the following sections:

- Summary Counts of Applicants at Key Stages
- Enrollment Funnel Chart
- Offers Expiring Soon

Track Offers, Acceptance, Payments, and Pre-Registrations

1. From the Dashboard view you can see the funnel of applications from offer through to acceptance, payment and pre-registration
2. At the top, you can see the number of visas in progress, accepted offers, new offers and applications with no decision. Each box can be clicked on to see further detail.

Change Dashboard View

1. The dashboard view can be changed to see the information by term or college.
2. To change the view select the relevant option from the dropdowns at the top of the page.

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Frequently Asked Questions

Q: Who has access to make changes to the application?

A: If the applicant created their profile, and selected your Agency during the application steps, then both the applicant and any Agent assigned to your Agency will have read and write permissions to the application. This means you can both Accept or Decline offers, and make updates to the Applicant Profile.

Q: Who receives email notifications?

A: Both you and the applicant will receive email notices.

Q: When are email notifications sent?

A: Automatic email notifications are sent after the college receives the submitted application, when the college issues an Offer (or Pre-Admit).

Application Statuses

- **Draft** - Any user can start an application, save as Draft and return later on in order to complete and submit. A college will not see Draft applications created by an Agent or Applicant. Once the application is submitted, then this goes into Review
- **Review** - An application that a college is currently reviewing/processing will be in Review status
- **Needs More Information** - During the initial review/screening of the application, if its determine that more information is required, or there are corrections needed in the application, then the state Needs More Information can be used. The Agent/Applicant will see this state along with indication of what needs to be fixed. Once the information has been corrected/provided by Agent/Applicant, the status goes back into Resubmitted and processing may proceed. See Triggering the "Needs More Information" for more details.
- **Resubmitted** - Once the necessary updates have been made to an application in the Needs More Information state, the application status will be changed to Resubmitted.
- **Closed** - A College Admissions Officer can Close an application when they are no longer actively processing. Typical scenarios include
  - The application is a duplicate (same applicant applied through multiple Agents)
  - College has Declined these program selections: applicant does not meet the Admission Requirements for any of their program selections
  - Agent/Applicant has Declined an Offer, or Withdrawn Acceptance to an Offer (and indicated they are no longer interested in pursuing the application)
  - College has Revoked an Offer (for example, Acceptance deadline passed/offer letter has expired)

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	➢ When the application is "Closed", the Agent/Applicant still has view access to the program decisions and their profile, however they can no longer add/remove program selections or re-rank.
ⓘ	➢ An Agent/Applicant may submit a second application (to the same college) only once the previous application has been set to "Closed".

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