International Application Service

Agent Portal User Guide

Updated: October 2022

Contents

Conventions Used in this Document

The International Application Service Agent Portal User Guide has been updated for the October 2022 release.

The following conventions are used to indicate new and updated content in the guide:

New in the October 2022 Release

Updated in the October 2022 Release

Also, screenshots have been updated to reflect changes in the Portal user interface.

Access the Agent Portal

Register Your Account

When you have been granted access to the agent portal for the first time, you will receive an email with information about registering for the Agent Portal.

Click the **Click here to create an account** link to begin registering your account.

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 Reset Forgotten Password section of this user guide.

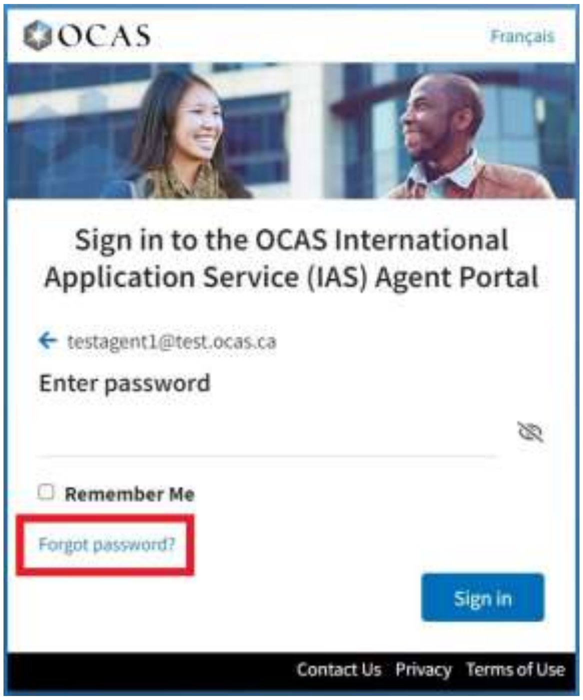
1. Go to https://international.ocas.ca/agent.
2. Enter the email address and password that you chose when registering your account.

3. Click **Sign in**.

Change My Password

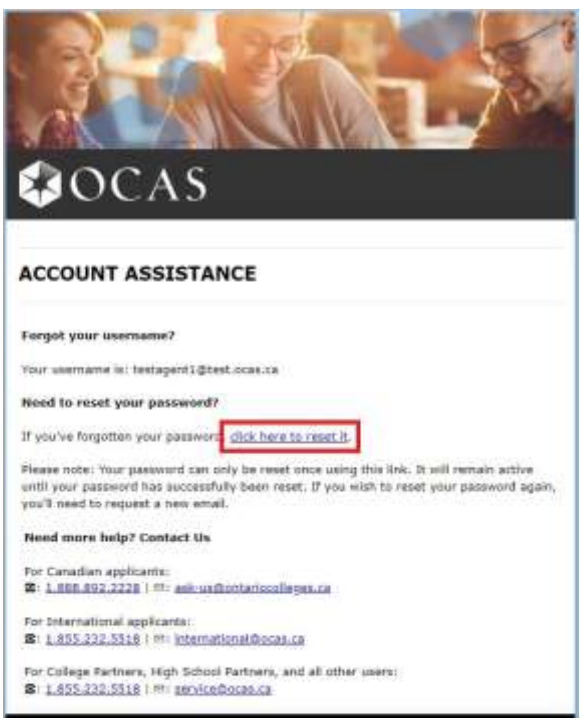
Reset Forgotten Password

1. Go to https://international.ocas.ca/agent.
2. Enter the email address that you used to create the account and click **Next**.
3. On the next screen, click **Forgot password**.



4. On the Forgot Password page, click **Reset Password**.
5. Check your email for an Account Assistance message.

   If you don't see it, check the Junk folder.



6. Click the link to reset your password.
7. On the Password Reset page, create a new password that satisfies the following criteria:
   - 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:

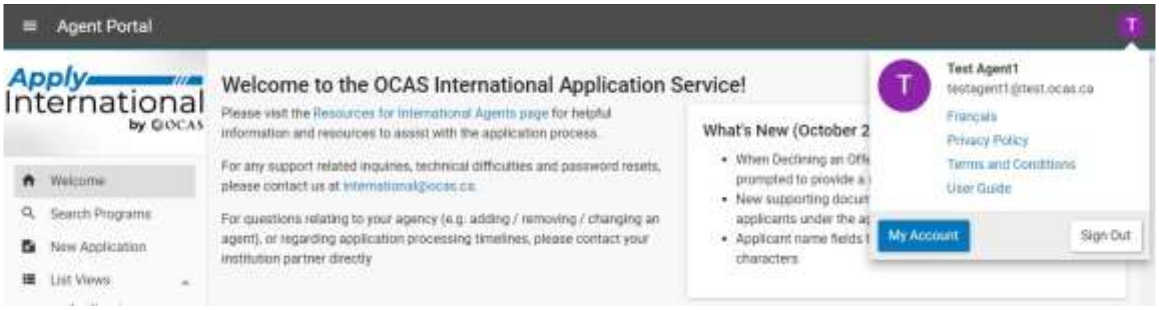
@ # $ % ^ & * - _ + = [ ] { } | \ : ' , ? / ` ~ " ( ) ; .

8. Click **Create**.

Change Password When Signed In

This section of the user 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 Reset forgotten password section.

1. Sign into the Agent Portal.
2. Click on the icon with your initial in the top right corner of the screen to access your account details.



3. Click **My Account**. You will be redirected to the account management page.
4. In the navigation pane on the left, click **Change Password**.

5. On the Change Password page, enter your current password.

6. Create a new password that satisfies the following criteria:
    - 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:

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

7. Confirm the new password and click **Save**.

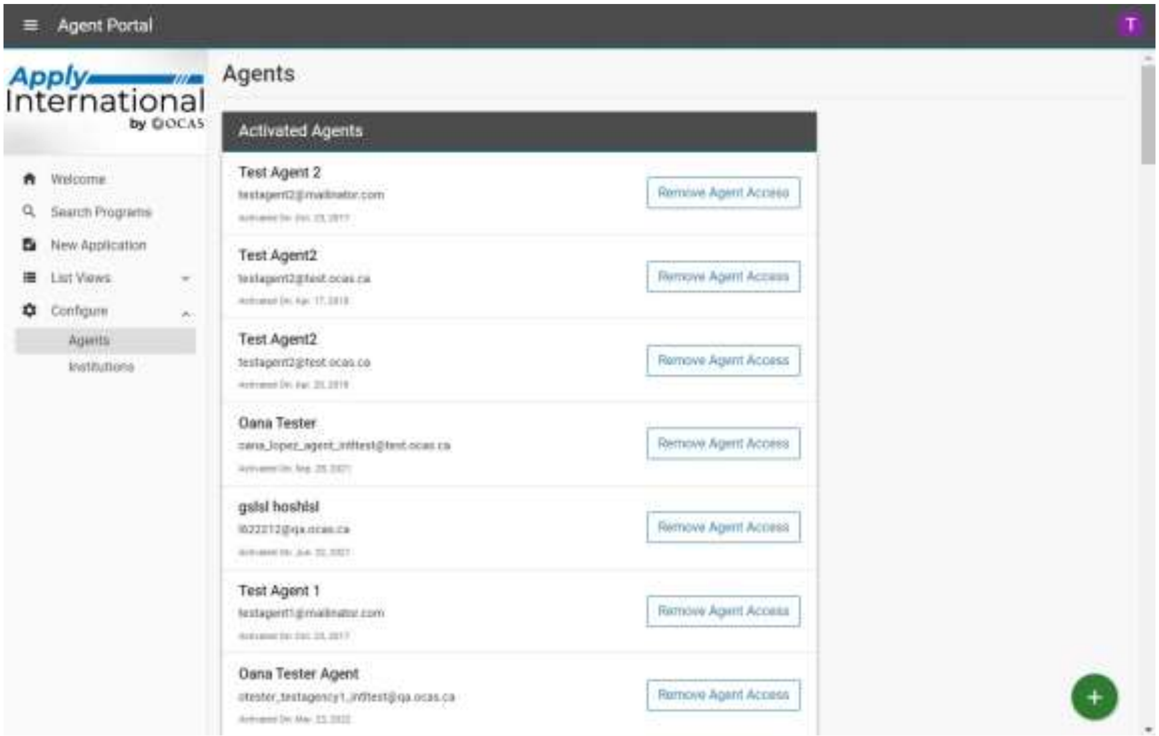
   You will be logged out and prompted to log back in with the new password.

Add a New Agent Portal Account or Remove an Agent Accounts

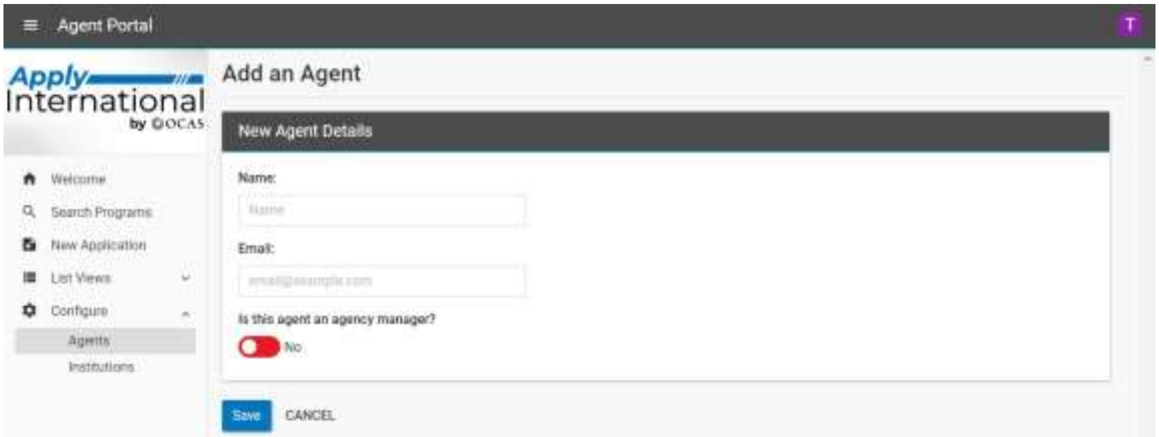
Agency Managers can see who from their agency has access to the IAS. This is done by navigating to the Configure > Agents page.

On this page, the Agency Manager can see agents in the following statuses:

- **Activated** – Currently have access to the IAS
- **Invited** – Registration email has been sent but the agent has not completed their activation
- **Deactivated** – No longer have access to the IAS



On this page, agency managers can invite other agents from their agency to the IAS. Selecting the green “Plus” icon in the bottom right of the screen will direct the agency manager to the Add an Agent screen. They can then add the new agent’s details. Upon clicking save, a registration email will be sent to that agent.



If an agent does not receive their registration email, the agency manager can the registration email for that user. This is accomplished by scrolling to the “Invited Agents” section of the Configure > Agents page and clicking the “Resend Registration Email” for the correct agent.

The agency manager can also remove an agent’s access to the OCAS IAS by clicking **Remove Agent Access**. This moves the selected agent to the Deactivated Agents section of the page.

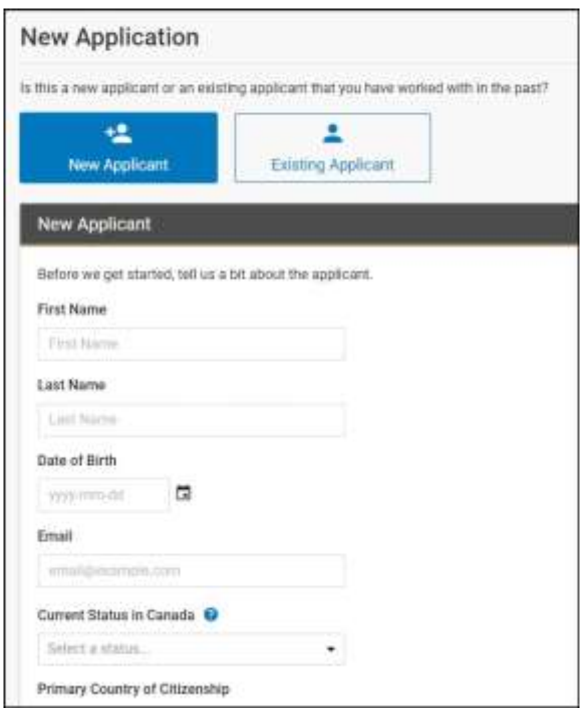
Creating and Submitting An Application

1. Log into your account.
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

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



Click **Continue**.

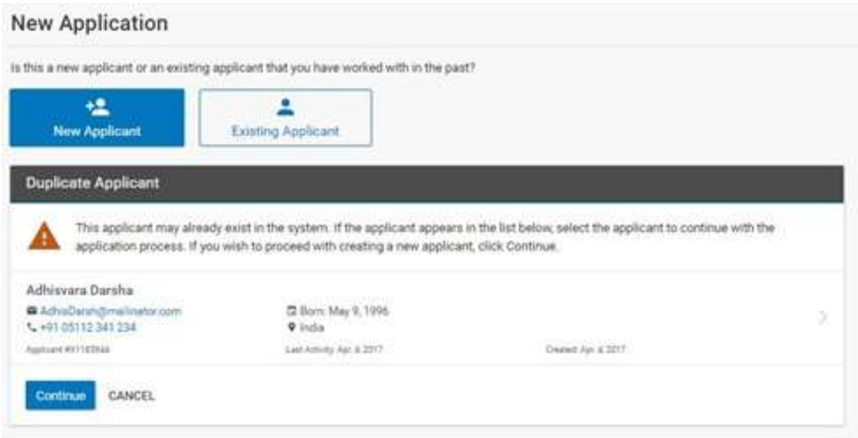
Note: Please enter the applicant’s name exactly as it is shown on their Passport.

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.

Handline a Duplicate Applicant

If the applicant already exists in the list for your Agency, it's 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, click **Continue**.

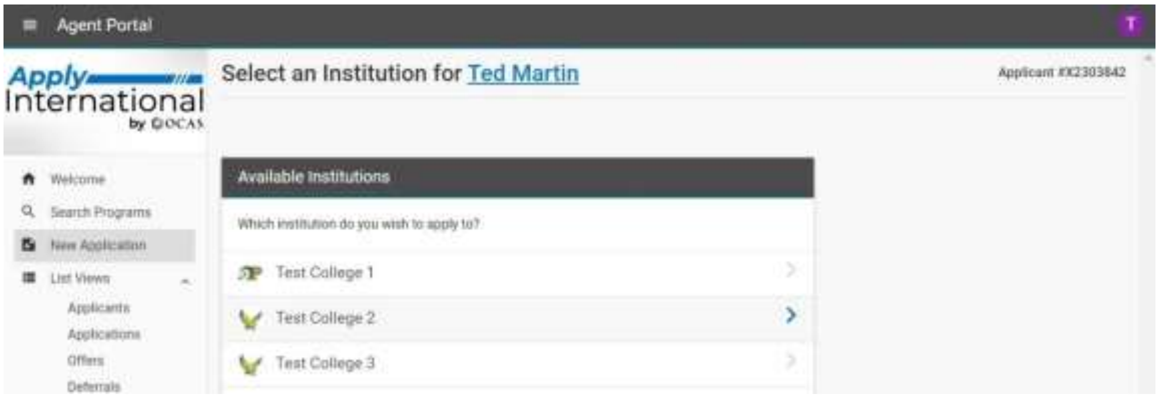
Note: Duplicate Applications create challenges for college admissions staff and slow down the application processing time. Please avoid creating duplicate applications wherever possible.

Select a College

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

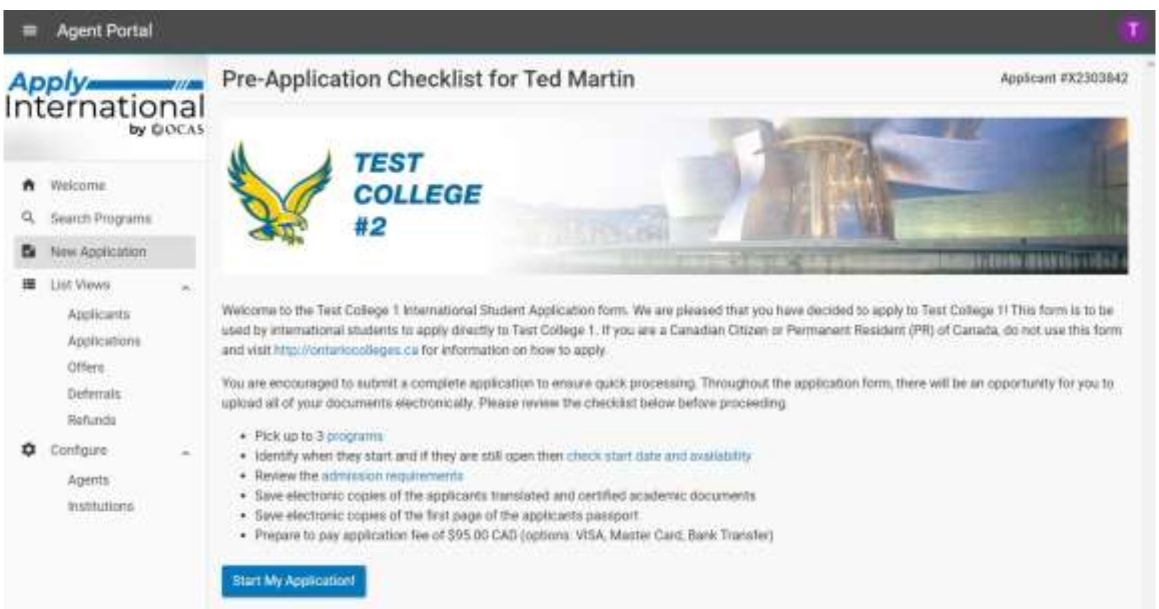
You will only be able to view the colleges using our system that you have a current agreement with.

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.



The Pre-Application Checklist for the new applicant opens. This page includes a welcome message to the applicant, and a list of instructions and things to review before continuing with the application.

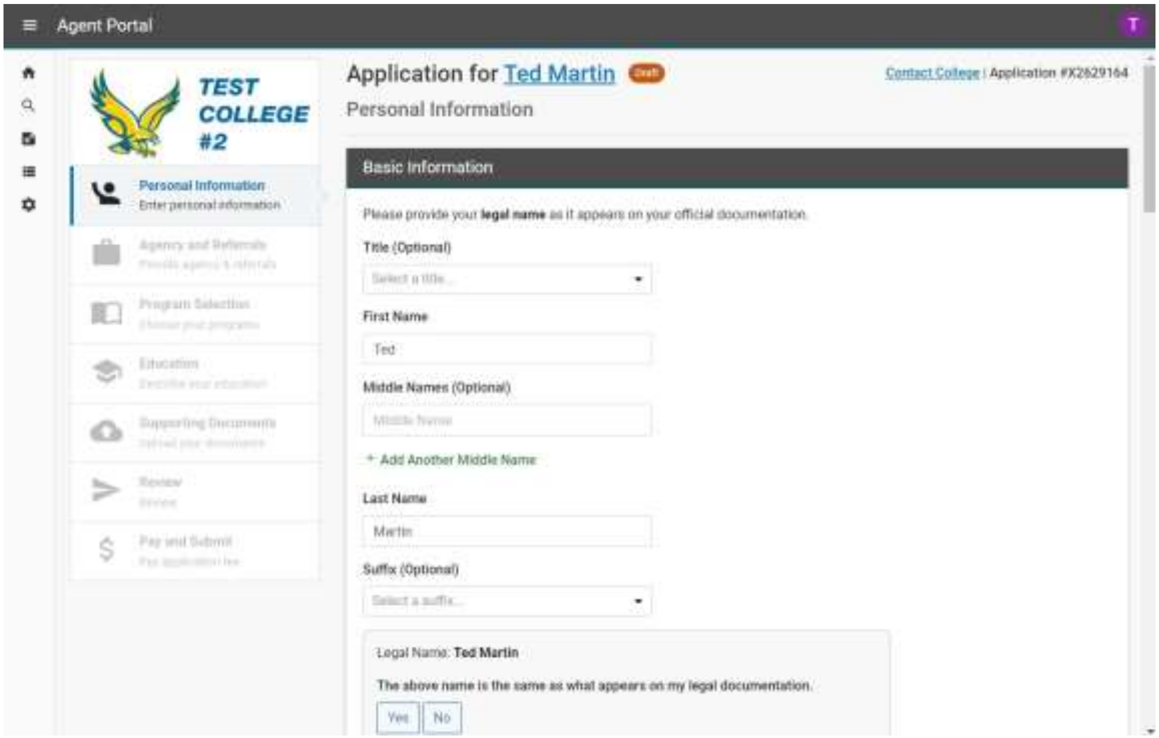
Here's an example:



Click **Start My Application**.

Personal information

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



You must enter the following details before proceeding to the next step in the application.

Basic Information

Enter the applicant's legal name as it appears on their official documentation.

1. Enter the applicant's **Title** (for example: Mr., Dr, Miss, or Mx) if it appears on their official documentation.
2. Enter the applicant's **First Name**, also known as Given Name.
3. 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.
4. Enter the applicant's **Last Name**, also known as Family Name or Surname.
5. If needed, enter the applicant's **Suffix**.

Note: 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.

6. 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**.

7. If the Applicant has a casual name that they use, click **Add Casual Name**, enter the details, and click **Done**.
8. Confirm the applicant's **Date of Birth** that was previously entered.
9. Select the applicant's **Country of Birth**.
10. Select the applicant's **Gender** identity.
11. Select the applicant's **First Spoken Language (Mother Tongue)**.

Citizenship

1. Confirm the applicant's **Current 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** that was previously entered.
3. Confirm the applicant's **Passport Number**. That was previously entered.

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 **Yes** to the question **Is your current address the same as your mailing address**.
3. If the applicant lives at a different address, select **No**, and enter their current address.

Applicant's Contact Information

1. Enter at least one phone number for the applicant.

   You may enter any additional phone numbers or email addresses where the applicant would prefer to be contacted.
2. Enter all needed details for an Emergency Contact for your applicant.
3. Click **Save + Continue**.

Note: 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 Agency

In the next section of the application, you can add the following details for the applicant:

Agency Details

1. Click **Yes** under the question **Are you working with an Agent**.

   Your Agency will be pre-selected from the dropdown.

2. 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.

3. Click **Save + Continue**.

Referral Details

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, click **Yes**.
2. Select the name of the school the applicant is associated with from the drop-down menu and click **Save + Continue**.

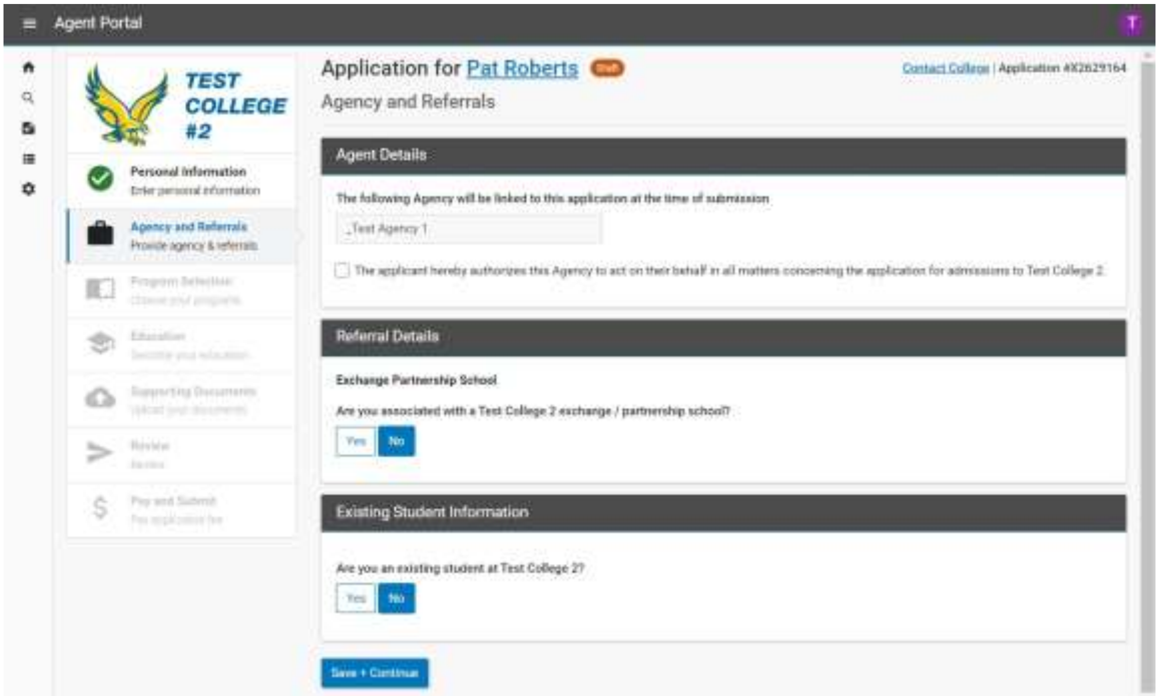
Refer a Friend

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

Existing Student Information

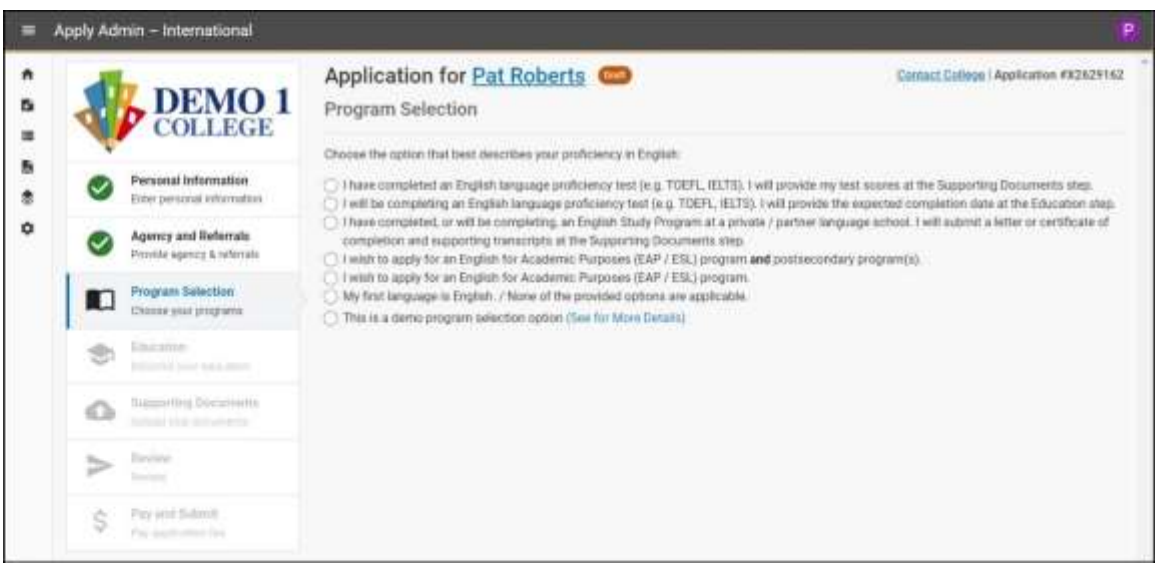
If the applicant attended the college previously, they can enter that information here.

1. Click **Yes**.
2. Enter the applicant's college student ID and college email address.
3. Click **Save + Continue**.



Program Selections

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



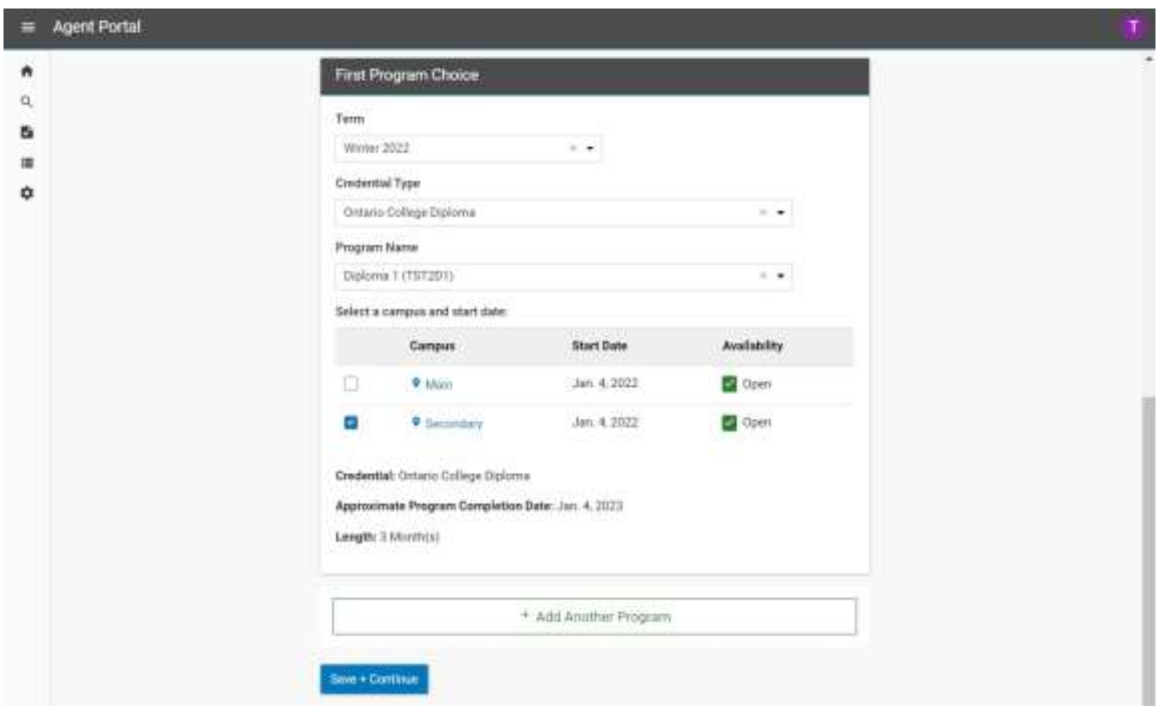
Once selected, the First Program Choice box will appear below.

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

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.

   Click the check box beside the desired campus and start date combination.



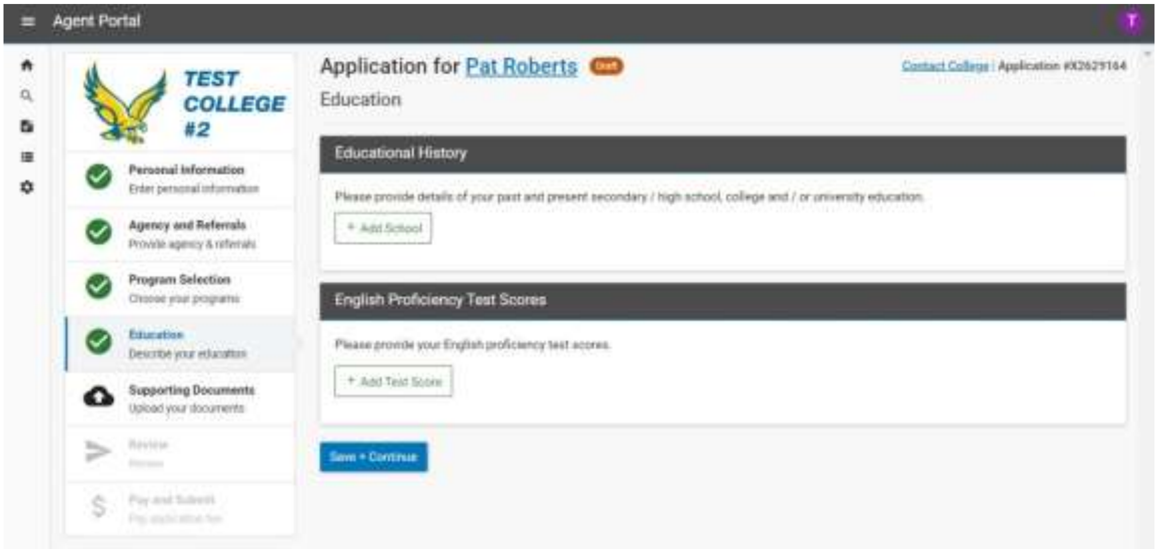
   Note: You may select a program only if it has a Campus + State Date with an Open or Waitlisted availability. You may not apply to a Closed intake for a program.

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

Education

1. In the Schooling section, click **Add School**.

Note: You must define at least one school item for the applicant, in order to submit the application.

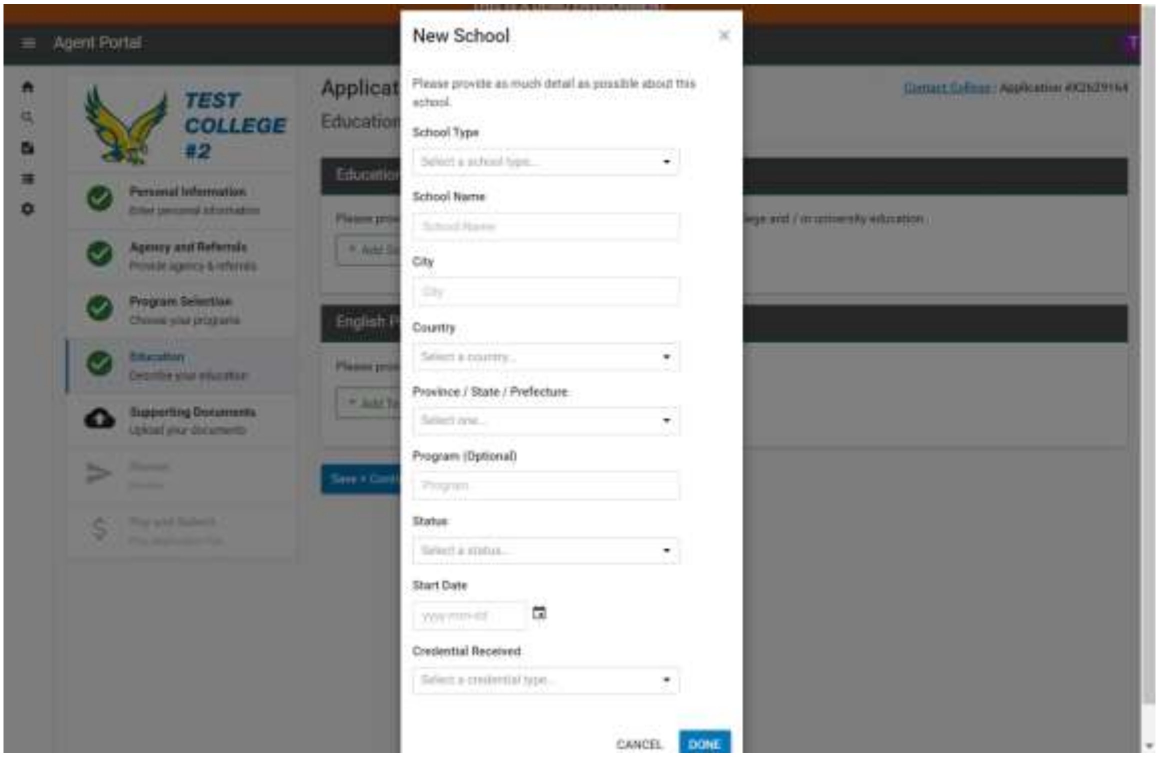


2. In the pop-up window, fill out the details of the Applicant's previous and current schooling.

   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

3. Click **Done**.
4. Use **Add School** to include any additional schooling information. We recommend including all relevant education background.
5. 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.

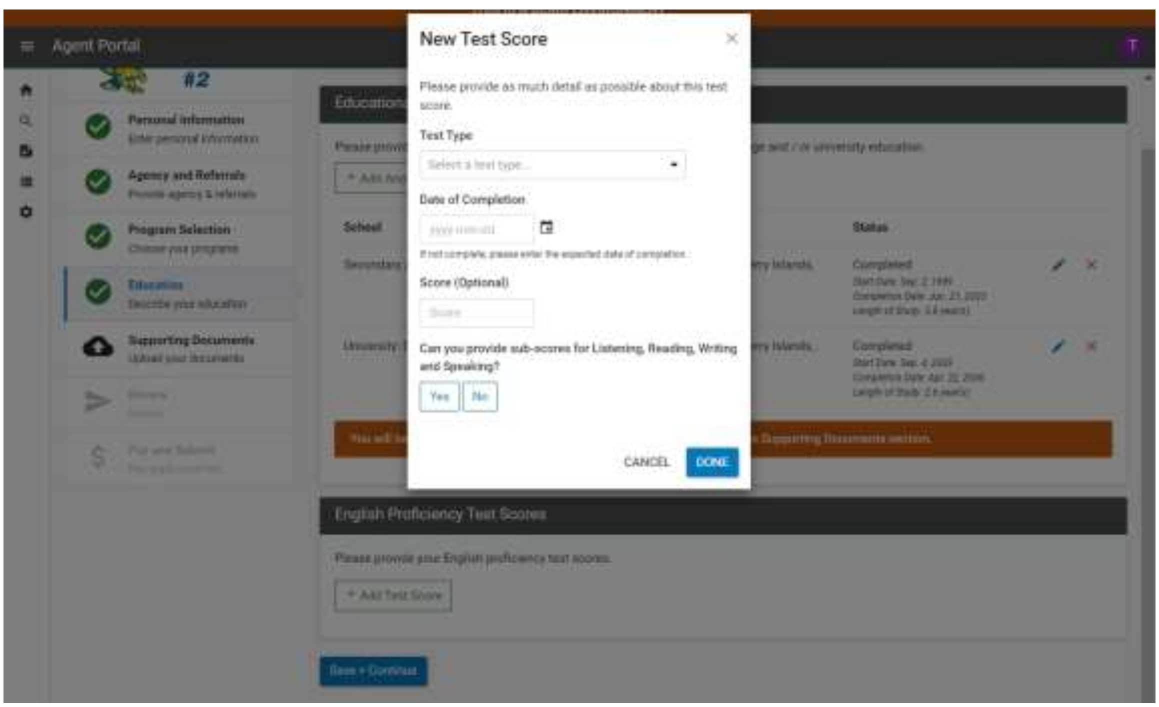


Adding English Proficiency Test Scores

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

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

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



You might see a message reminding to you provide the required supporting documentation.

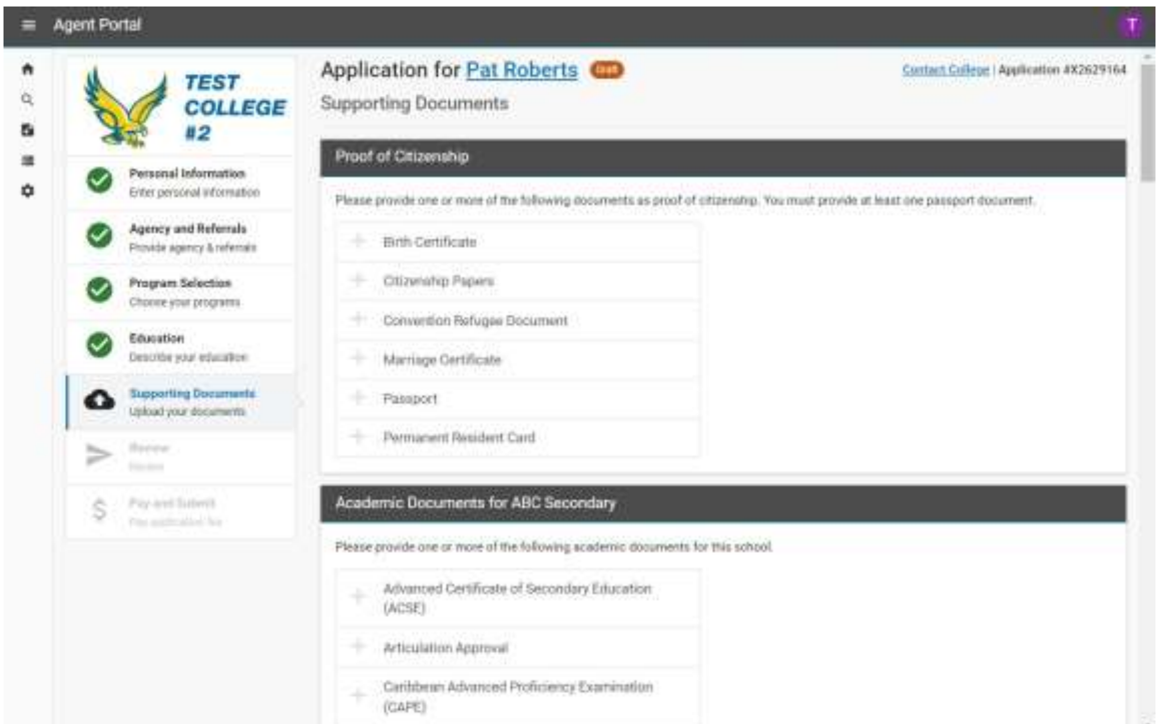
2. In the pop-up window, fill out the details of the applicant's test scores.

   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 **Done**.
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.

Supporting Documents

Now that you've added the applicant's education and English proficiency details, the next, step is to upload the supporting documents.



The Supporting Documents page is organized into groups, based on the following document categories:

- **Proof of Citizenship**

  Note: A passport must be provided as a Proof of Citizenship.

- **Academic Documents** for each school entered on the Education page
- **Test Scores** for the type of English Proficiency reported

You must provide at least one supporting document for each set of test scores entered on the Education page.

If the test is not yet completed, provide a document that shows proof of enrollment or proof of the scheduled test date.

- **Visa Documents**

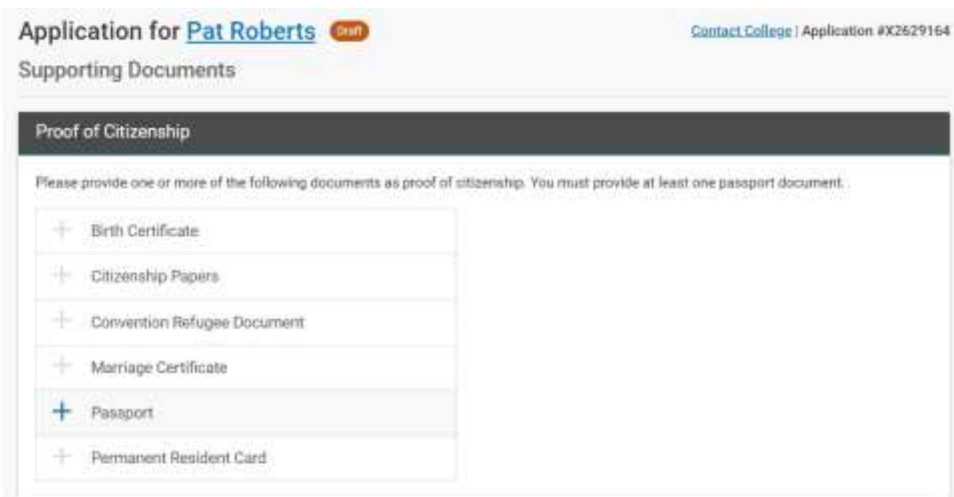
  New for October 2022 release: The Custodianship Declaration Form has been added to the list of Visa documents. This document is sometimes required by IRCC when the applicant is considered a minor (under the age of 18).

- **Program Specific Document Requirements**

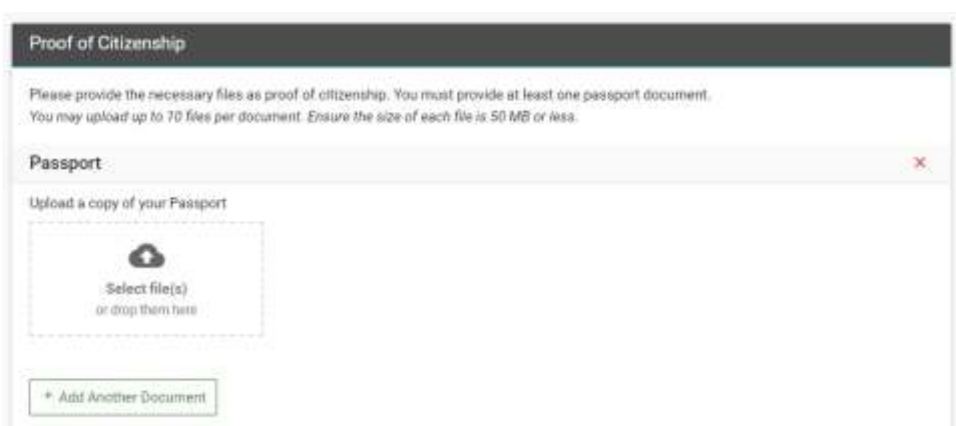
  Examples: Portfolios, Proof of Deposit or Tuition Payment, Resume, or CV

The following steps explain how to add a Passport as Proof of Citizenship. The process is the same for each type of supporting document that you need to add.

1. In the Proof of Citizenship section, click **Passport**.

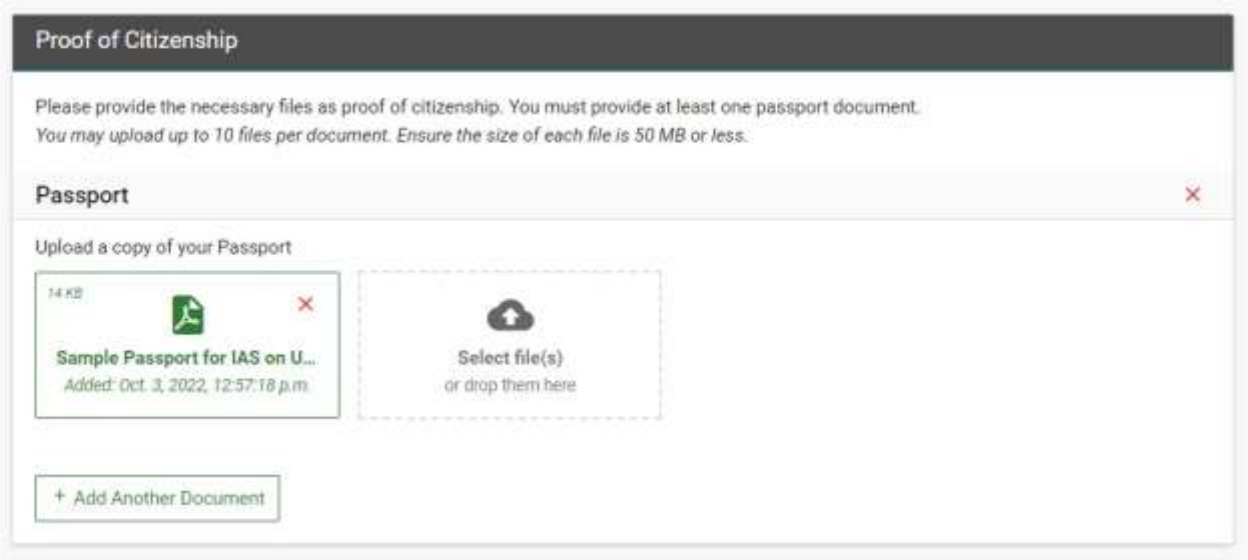


2. Click the Select file(s) area to select the document to upload or drag and drop a document from your computer onto the upload window.



Note: The scanned documents or photographs that you upload must be of good quality and easy to read.

The Passport document is added to the application. Documents in accepted formats will appear in green. Documents in unaccepted formats will show an error.



After you upload a document, the system checks for duplicate files, based on the file name and size. If an uploaded file matches one already in the system, a warning message is displayed. You must remove the duplicate file before continuing with the application.

3. If you want to add another Proof of Citizenship document, click **+Add Another Document** and repeat the steps.

To add another type of document, scroll down the Supporting Documents page to the appropriate section, click the type of document that you want to add, and repeat the steps.

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.

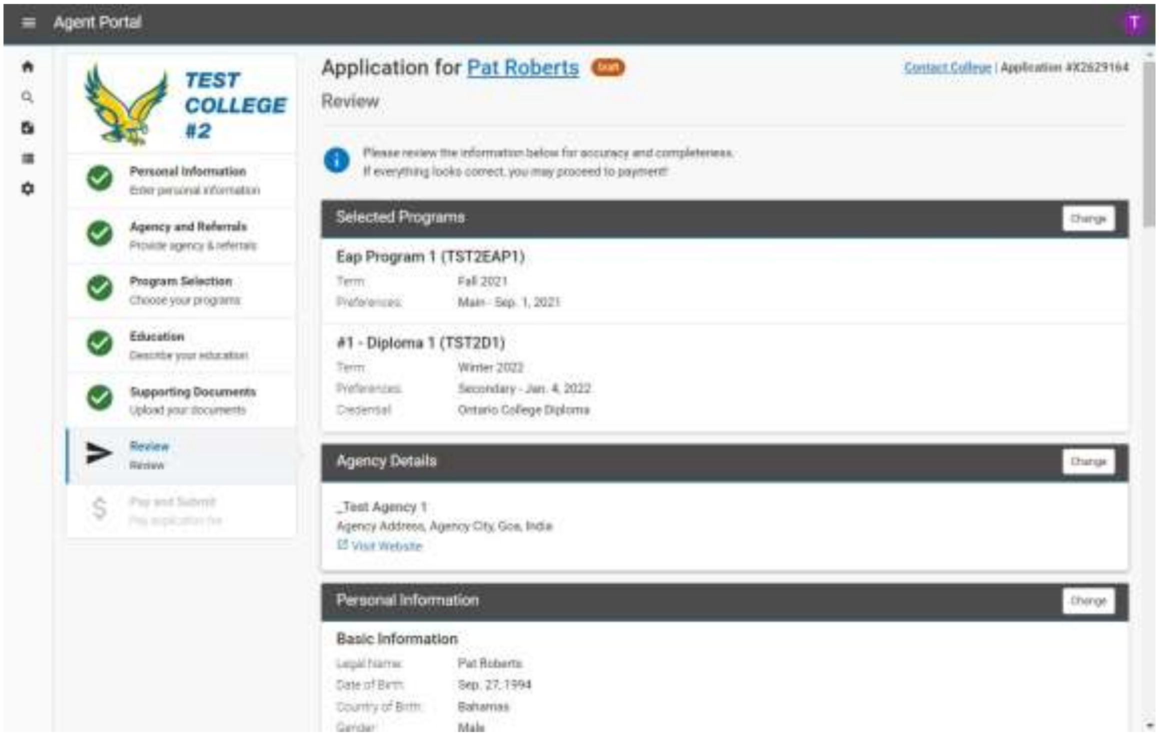
It's also possible to provide additional supporting documents after the application is submitted, such as Final Academic Transcripts or English Test Scores.

Review

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.

2. Scroll down this page to review the provided Program Selections, Education, English Proficiency, and Supporting Documents.

3. At the bottom of this page, click **Continue**.



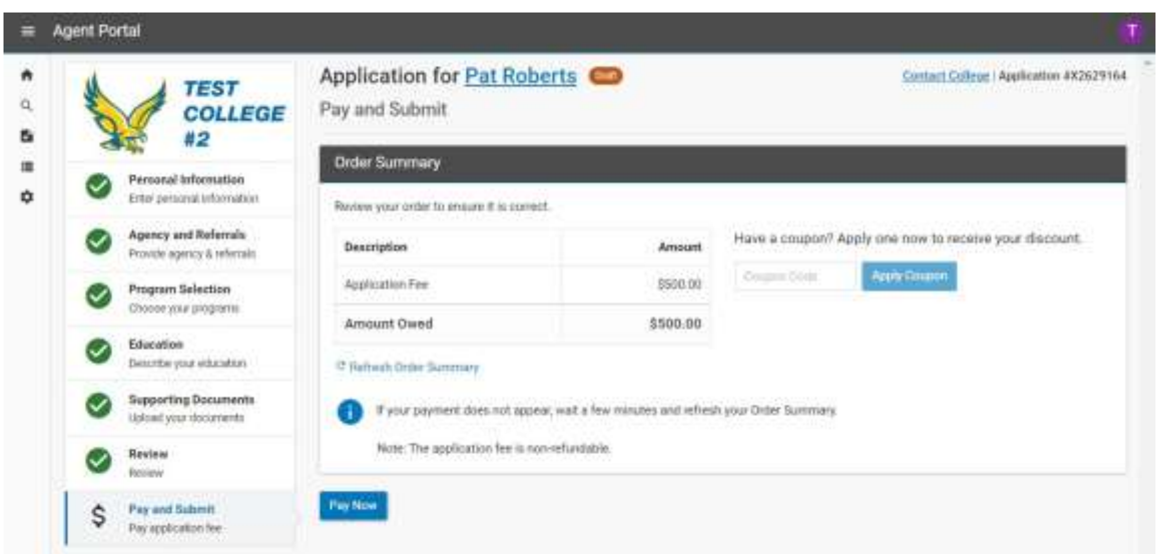
Pay and Submit

Review Order Summary and Apply Coupon Code

1. Review the Order Summary with the applicant.

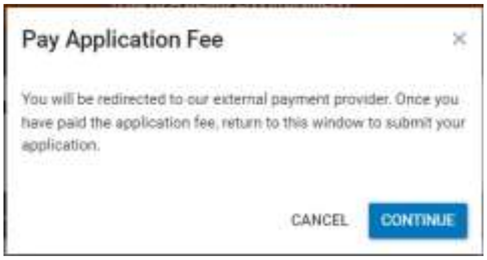
   If there is an active Fee Waiver (as part of the agreement the Agency has with the particular college), then you will see the appropriate fee waiver reduction amount. No payment is required if the full application fee is waived.

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

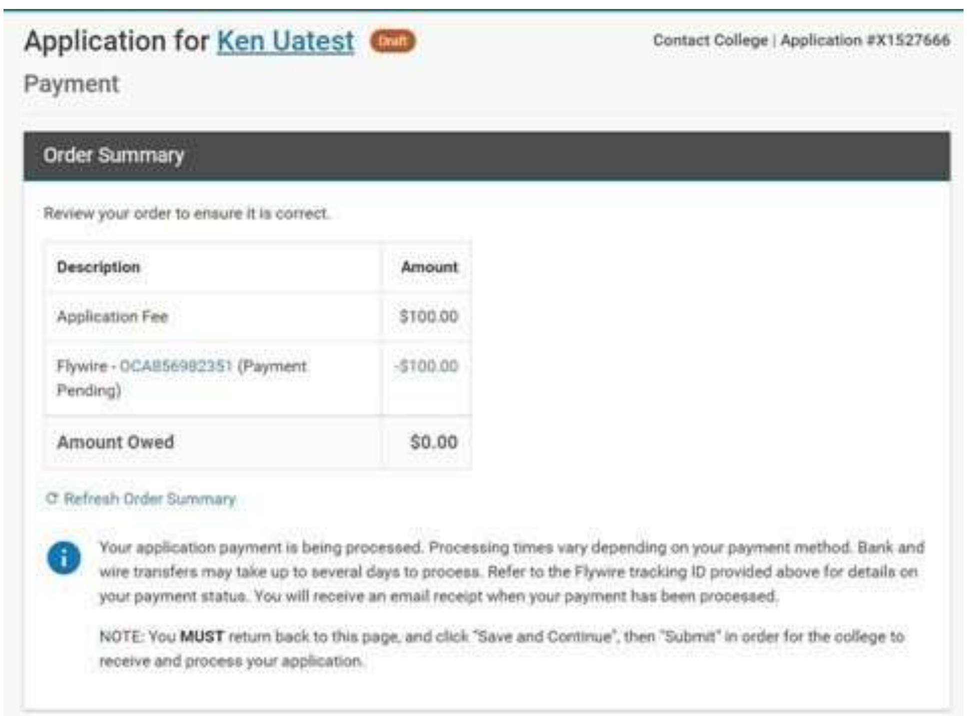
3. When you are ready to pay for the application, click **Pay Now**.
4. On the pop-up window, click **Continue**. You will be redirected to an external payment provider, Flywire, to complete the payment.



Make a payment through Flywire

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

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



When Flywire has processed the payment, the payment status will be changed to Guaranteed and you will be informed by email.

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 **Submit**.

   You will see a confirmation message on the next page.

9. Click **Done** to return to the Applicant dashboard.

How Do I Manage Applicants?

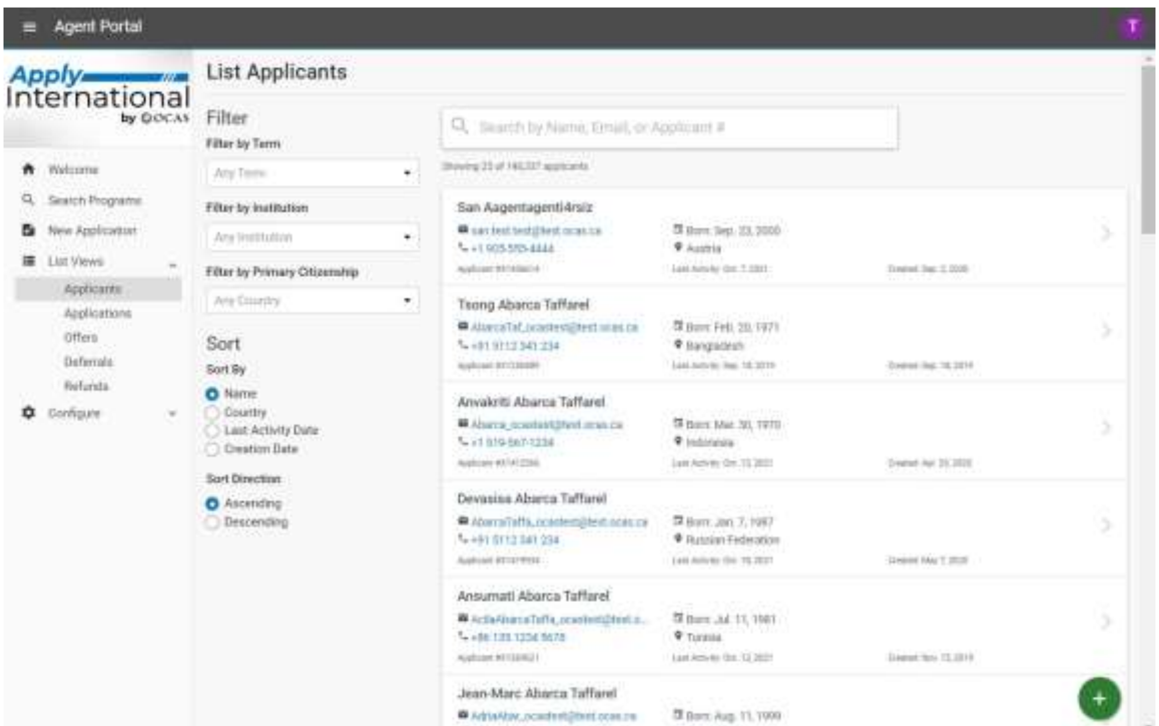
View a List of Applicants

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

1. Log in to your account

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

   The list of Applicants will be displayed to the right.



Search for an Applicant

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

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

Filter the List of Applicants

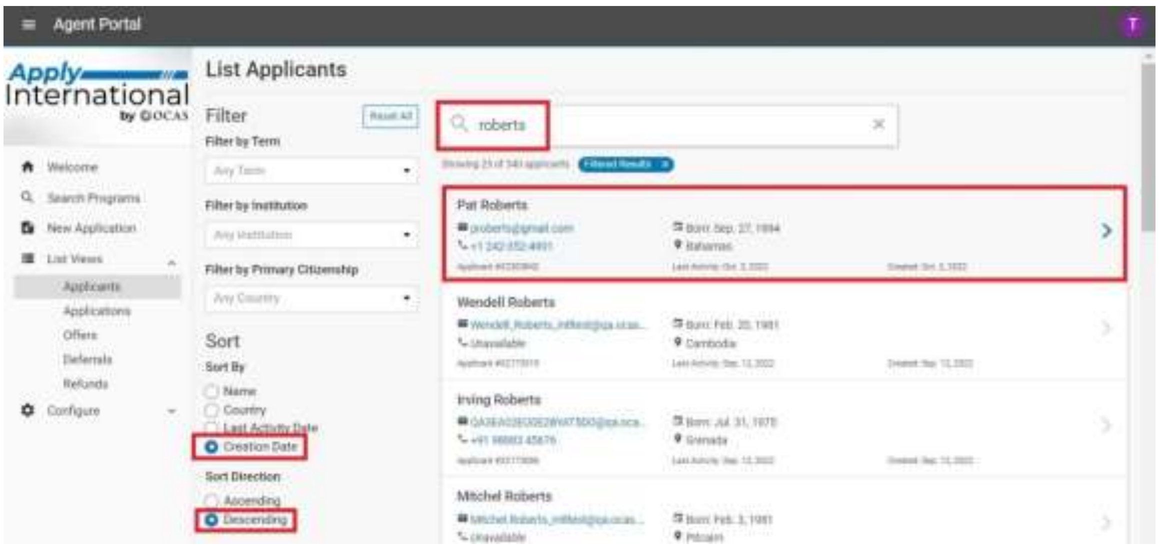
Select the filter that you would like to apply from the dropdowns to the left of the list. Applicants can be filtered by **Term**, **Institution**, or **Primary Citizenship**.

Sort the List of Applicants

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**. The list can be sorted in ascending or descending order.

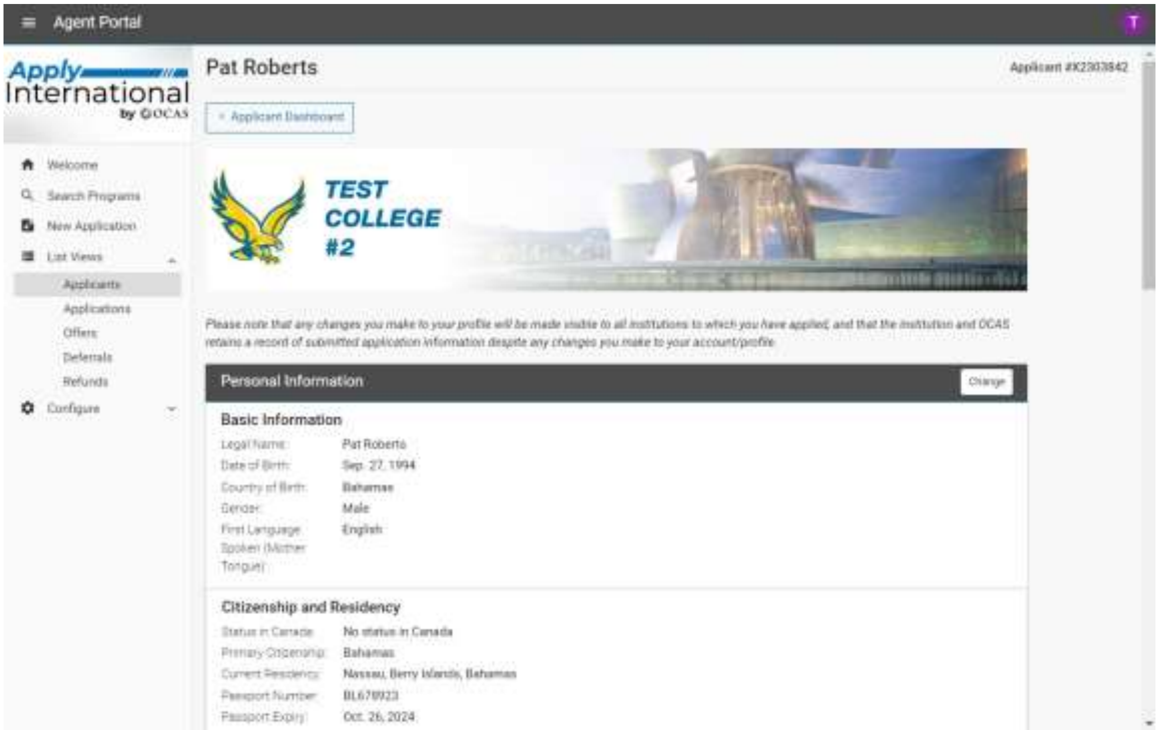
View and Edit Applicant Information

1. Log in to your account.
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 **View Profile**.

The applicant's profile information will be displayed on the next page.



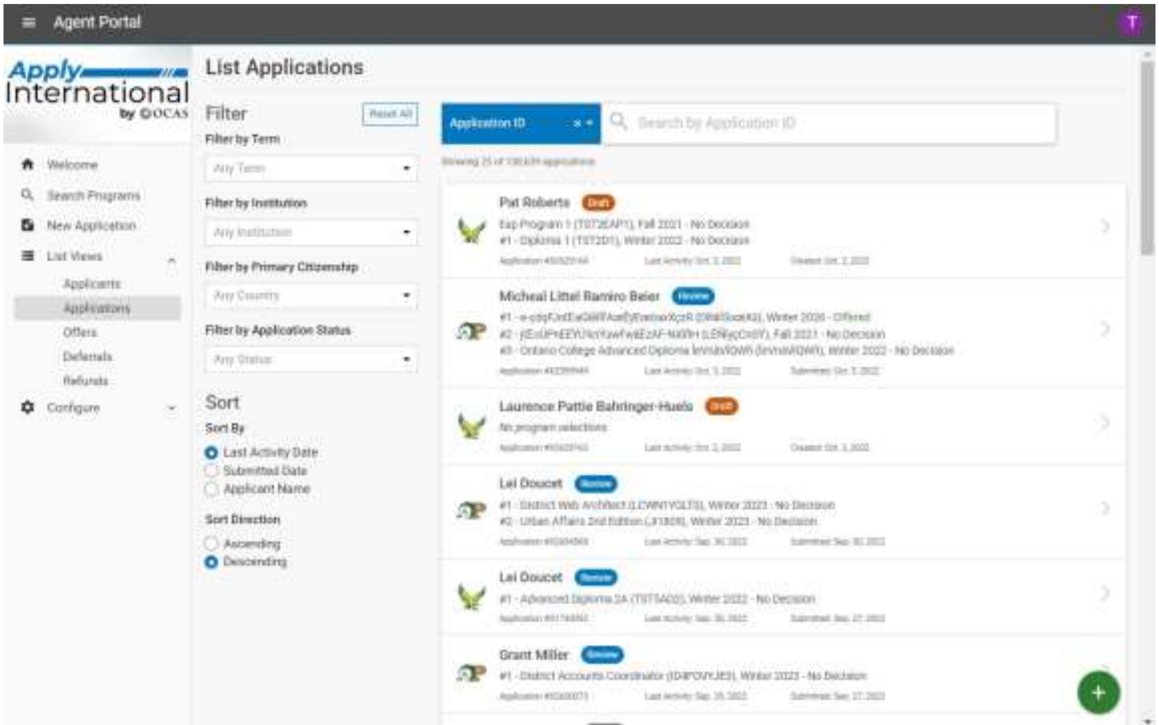
5. Click **Change** at the top right to edit the applicant's information.

How Do I Manage Applications?

View List of Applications

1. Log in to your account.
2. From the Dashboard view, click the **Applications** link under List Views on the left.

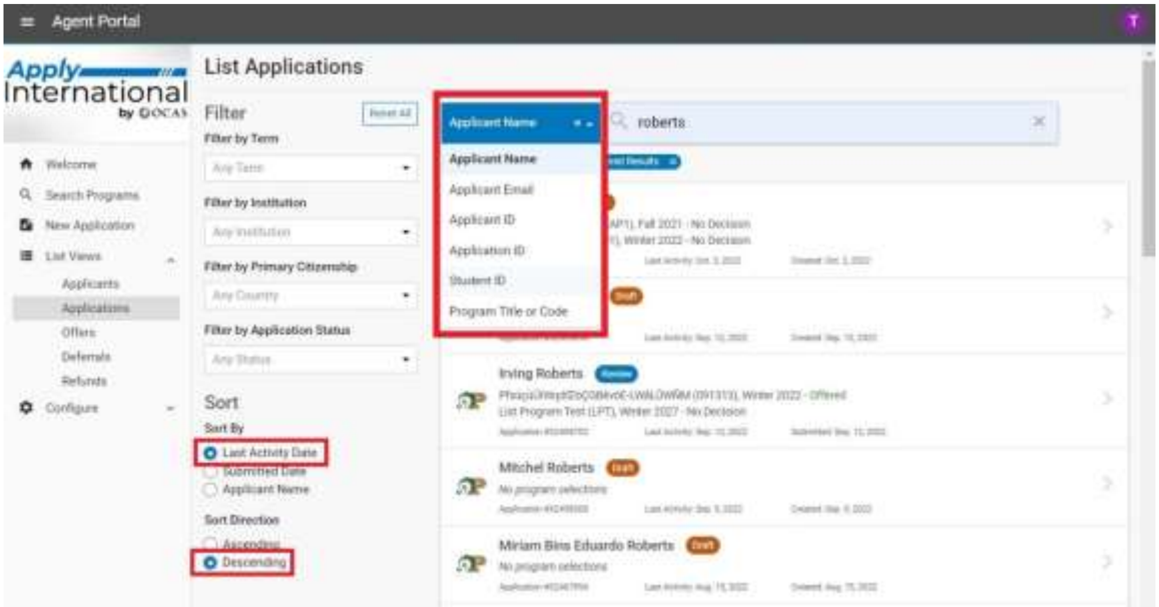
   The list of applications will be displayed to the right.



Search, Filter, and Sort the List of Applications

1. In the search bar, select a search parameter from the following:
    - Applicant name
    - Applicant email address
    - Applicant ID
    - Student ID
    - Program title or program code
2. Type in your search term and click **Enter**.

   The search results will appear below.



3. Select the filter you would like to apply from the dropdowns to the left of the list.

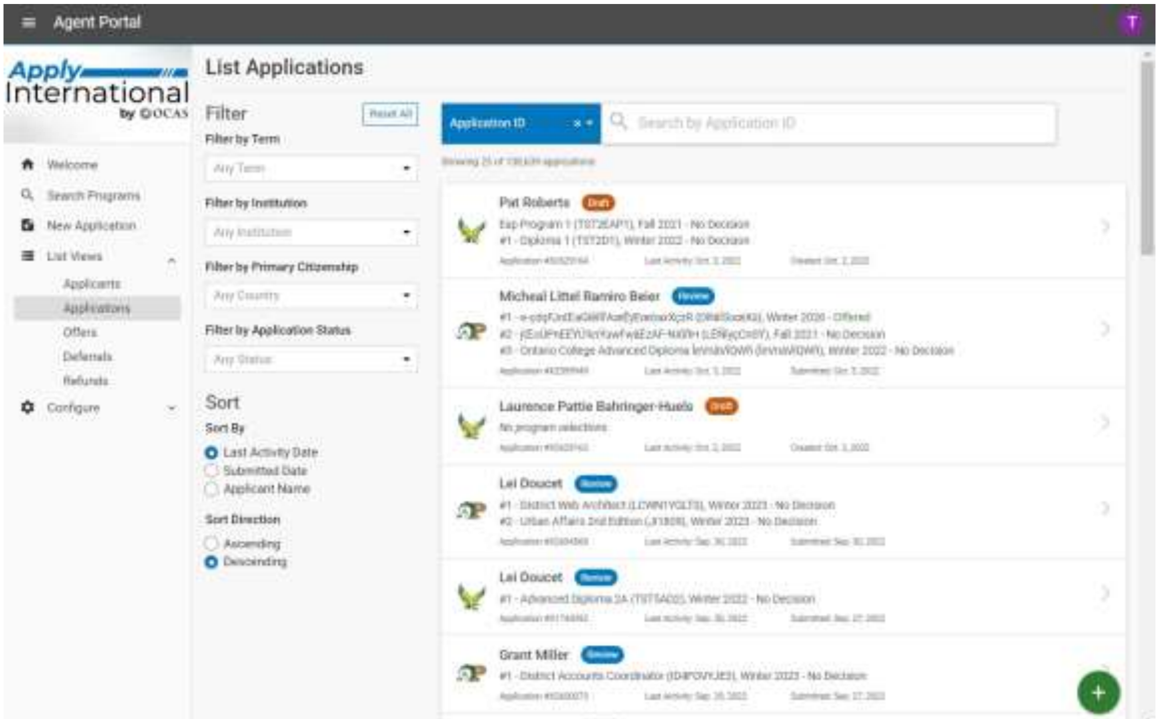
   Applications can be filtered by **Term**, **Institution**, **Primary Citizenship**, or **Application Status**.

   The list can be sorted in ascending or descending order.

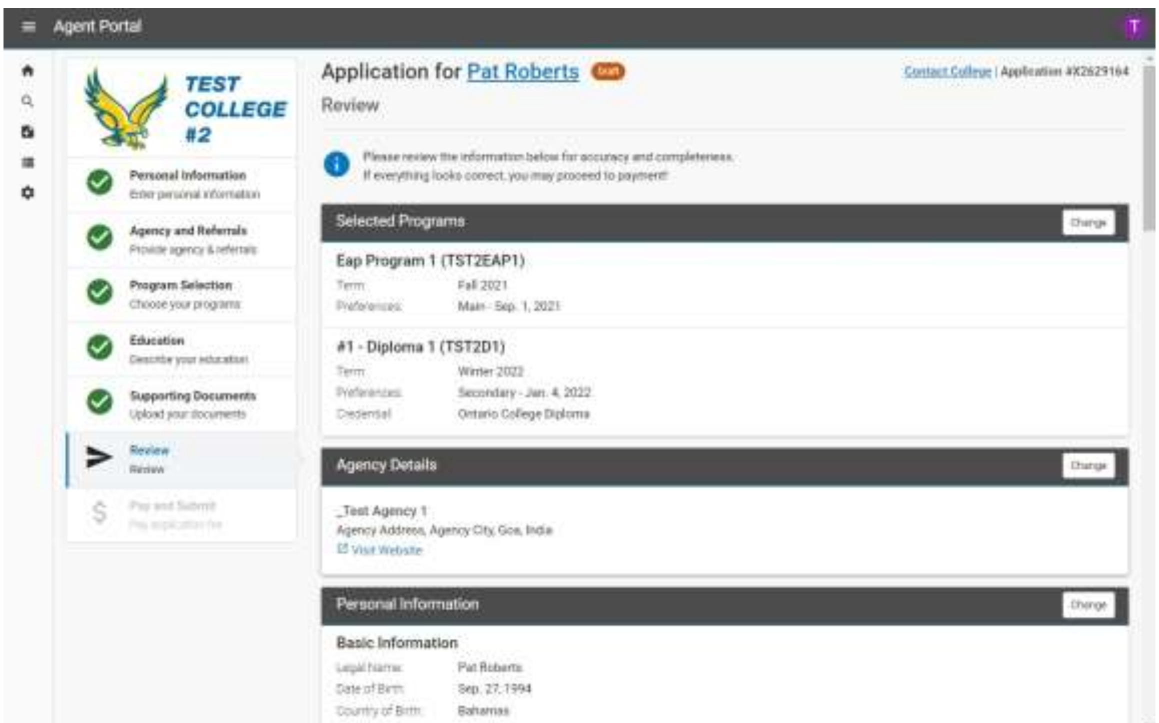
   You can reset all the filters and sort order by clicking **Reset All** in the Filter pane.

View and Edit Application Information

1. Log in to your account.
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.



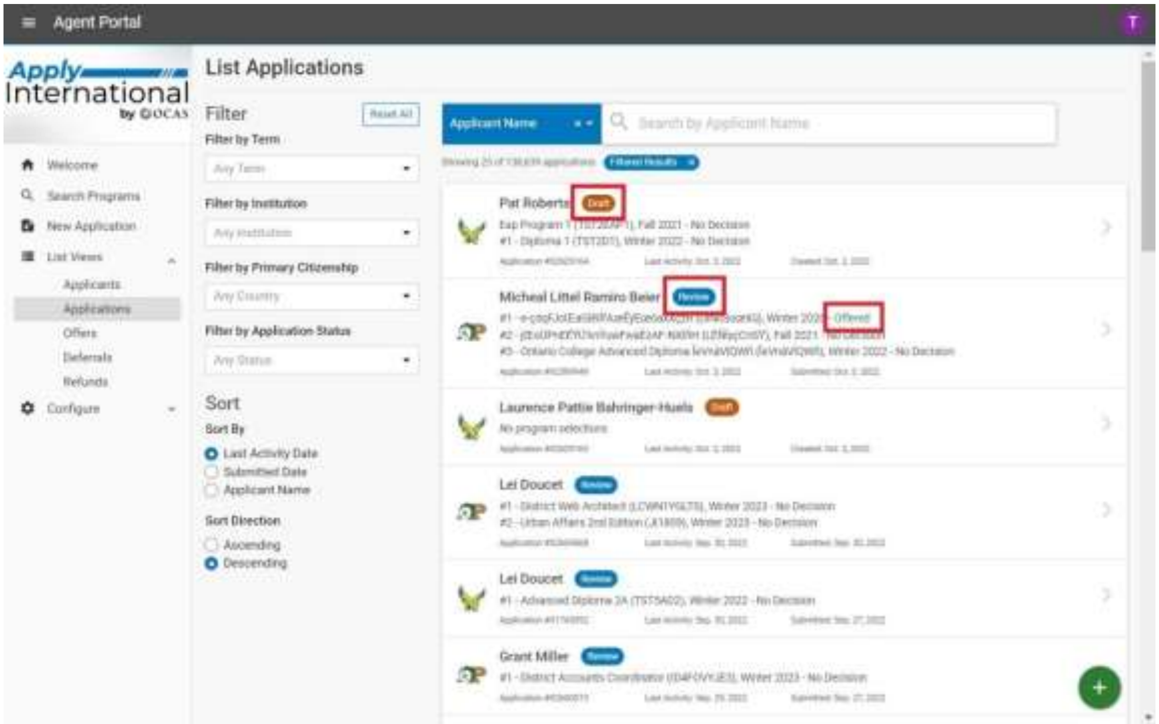
Adding Another Program Selection to an Application

- 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:
  - The college has made a decision of Decline or Waitlist on an existing program selection **and**
  - The application with the college doesn't already have the maximum allowed program choices
- When the application is in Closed state, no new program selections can be added.

View Application Status

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

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
- Offered

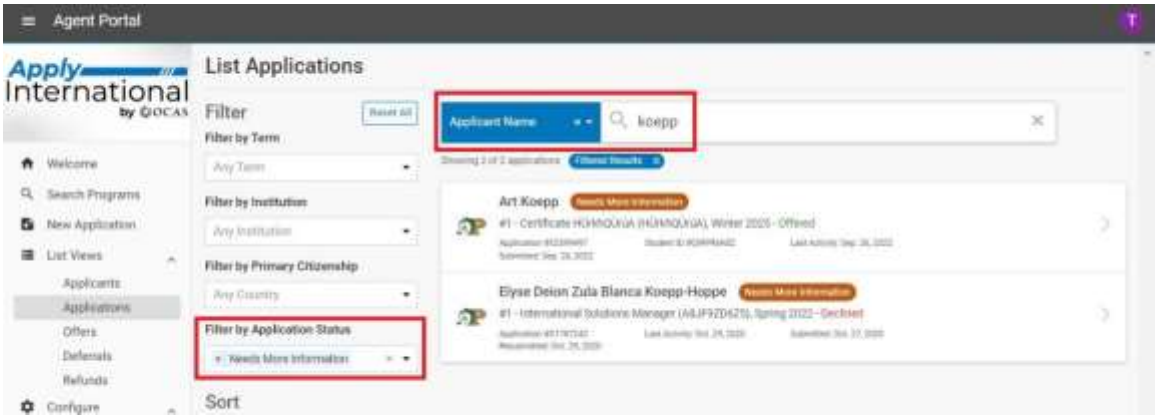
Responding to Applications that “Need More Information”

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.
2. Click the **Applications** link under List Views on the left.
3. Filter by Application Status = **Needs More Information** as shown below.



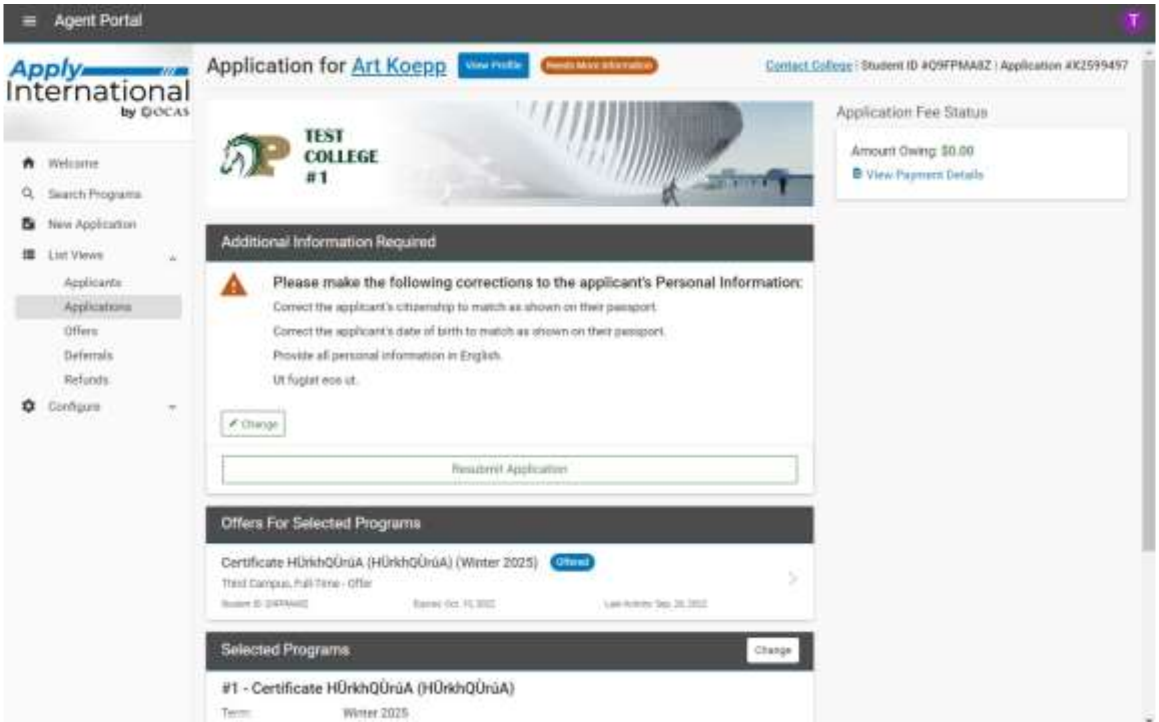
4. Enter the applicant’s name or the application ID into the search bar, in order to find the appropriate applicant. Select this item from the list.

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.

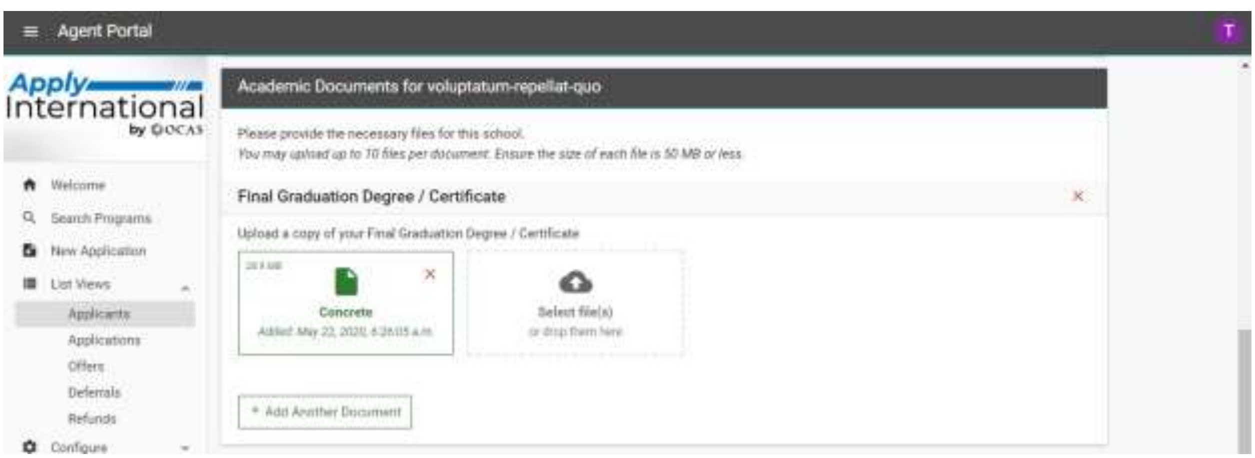
   The example below shows corrections for Supporting Documents.



2. Read the instructions carefully; then click **Change**.

Make the Necessary Corrections

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



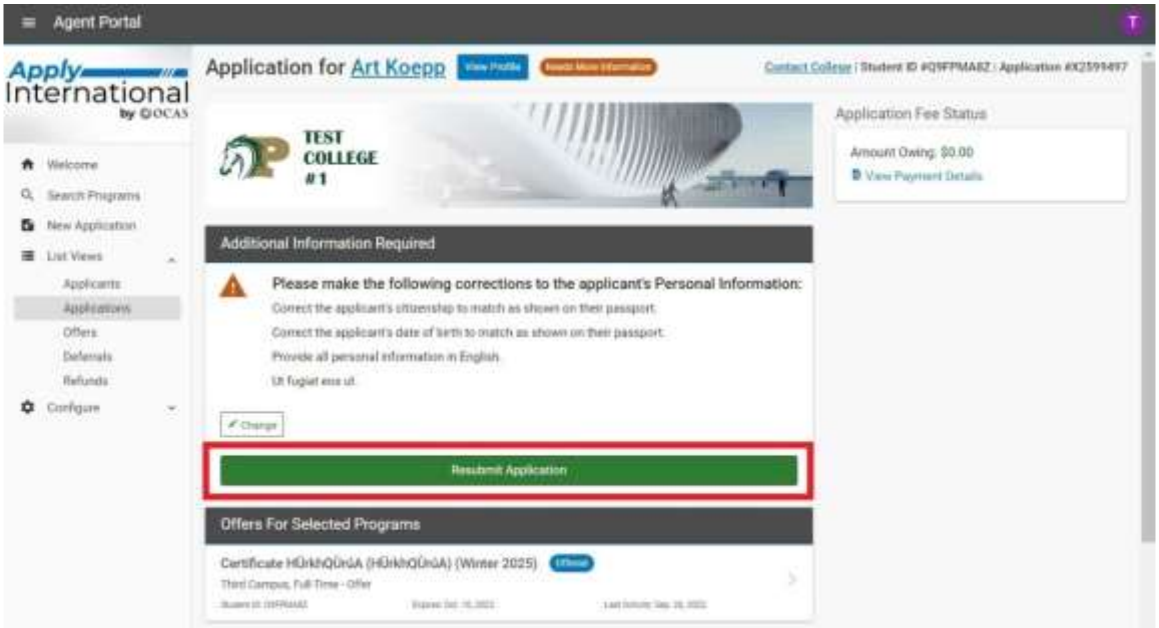
2. In the 'Academic Documents' section under the relevant establishment, click the type of document you will submit.

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**.

Re-submit application

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



After Resubmit, the application status will change to **Resubmitted**.

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.

How Do I Manage Offers?

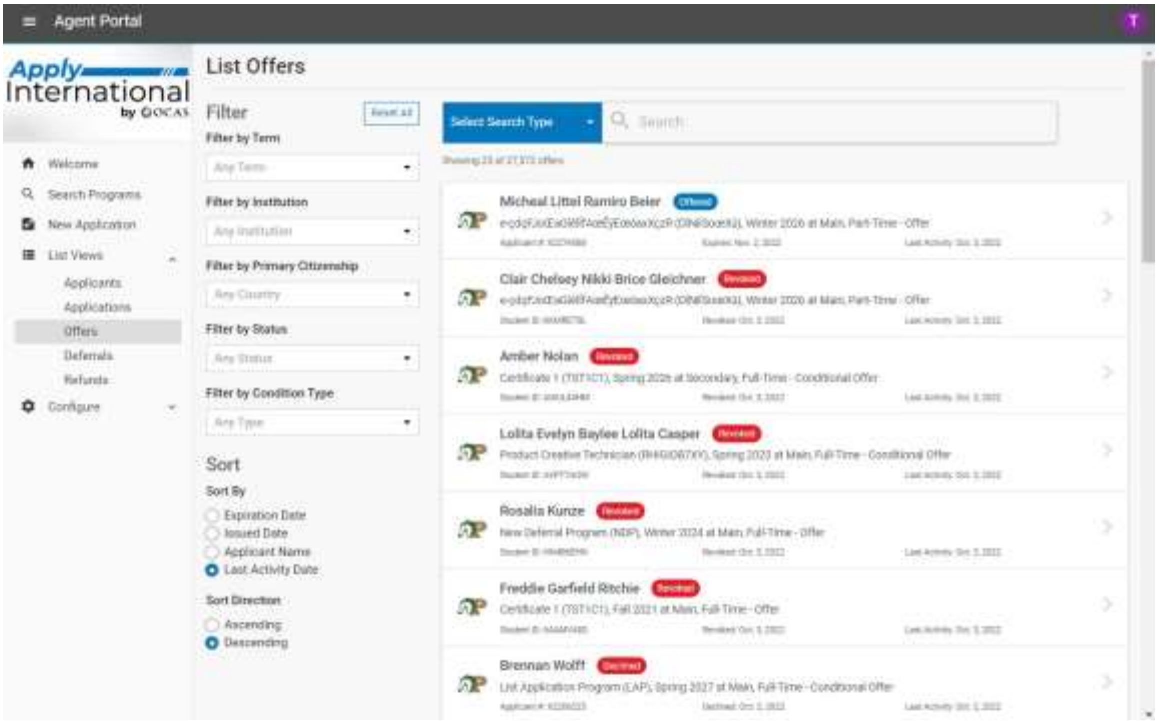
Search, Filter, and Sort the List of Offers

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

   The list of offers will be displayed to the right.

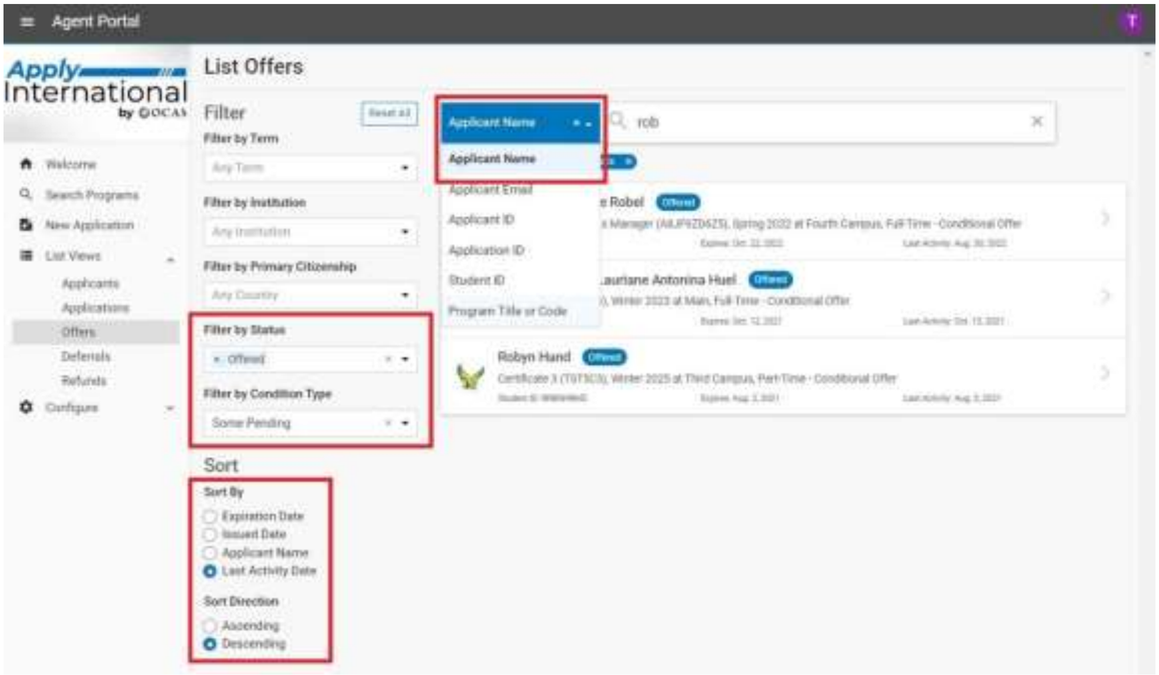
2. At the top of the list, enter the applicant's name, email address, program, or application number.

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



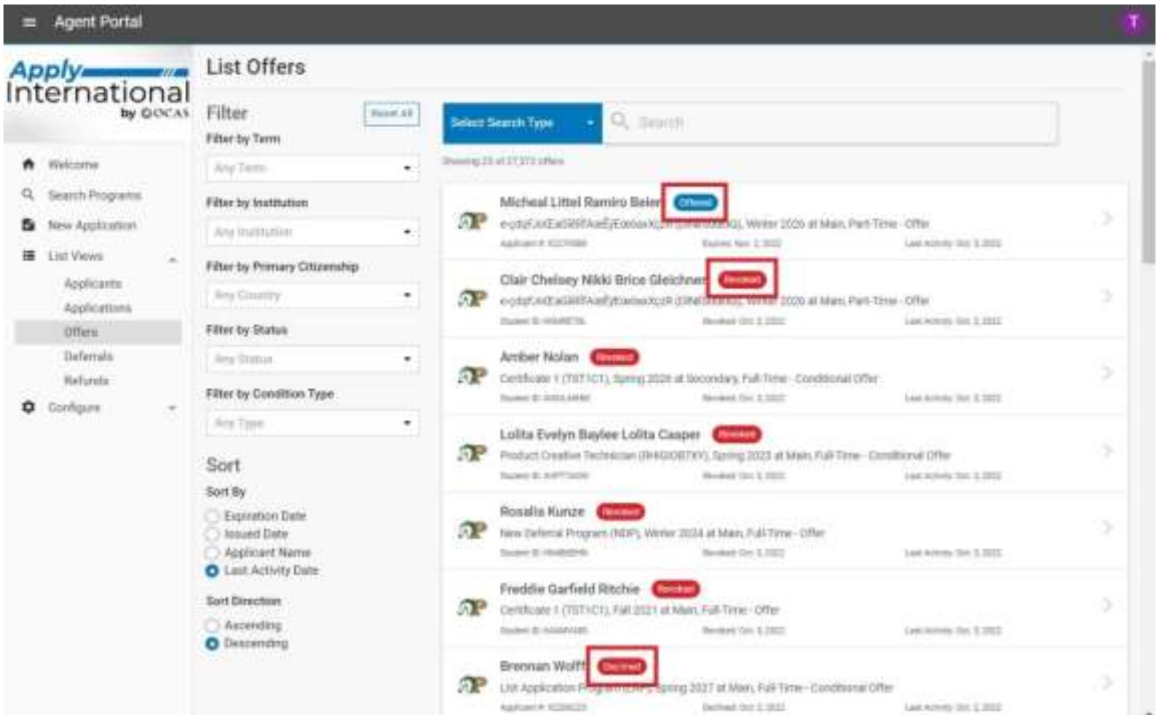
3. Select the filter you would like to apply from the dropdowns to the left of the list. You can filter offers by **Term**, **Institution**, **Primary Citizenship**, **Status**, or **Condition Type**.

4. Select how you would like the list to be sorted from the options to the left of the list. Offers can be sorted by **Expiration Date**, **Issued Date**, **Application Name** (last name), and **Last Activity Date**. The list can be sorted in ascending or descending order.



Viewing 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.



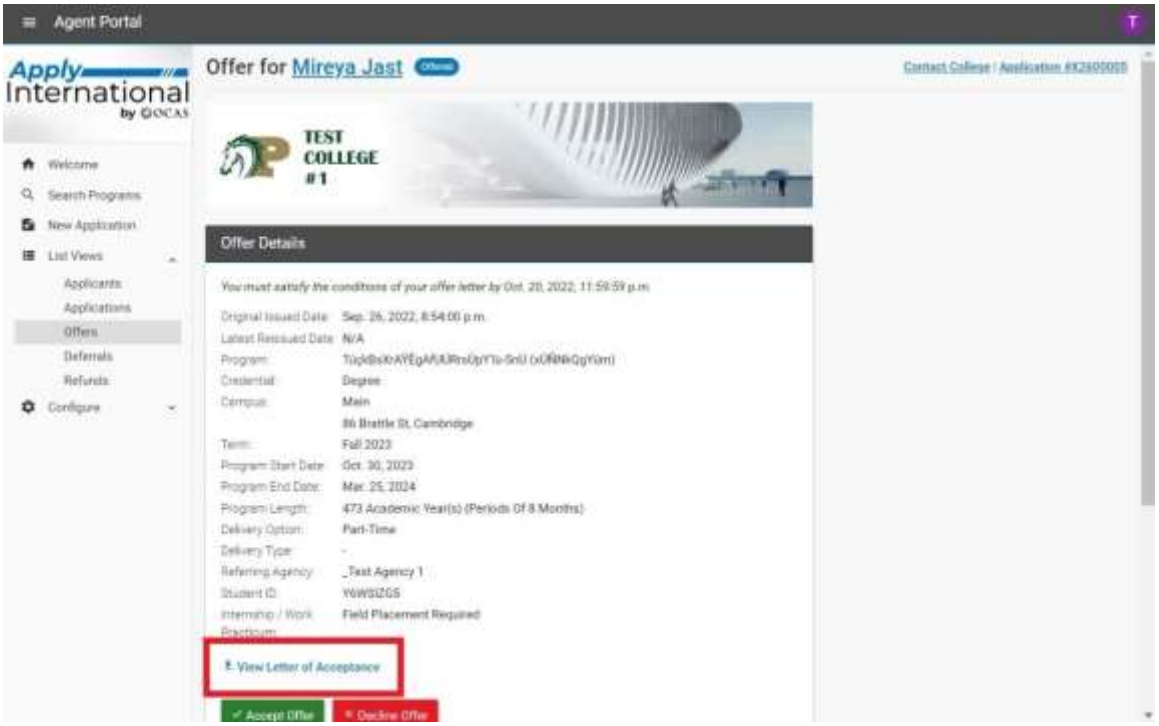
The college may issue an offer on:

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

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

View a 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.



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.

Accepting 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.

LETTER OF ACCEPTANCE

THIS LETTER CANNOT BE USED FOR VISA PURPOSES

DEMO 1 COLLEGE

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

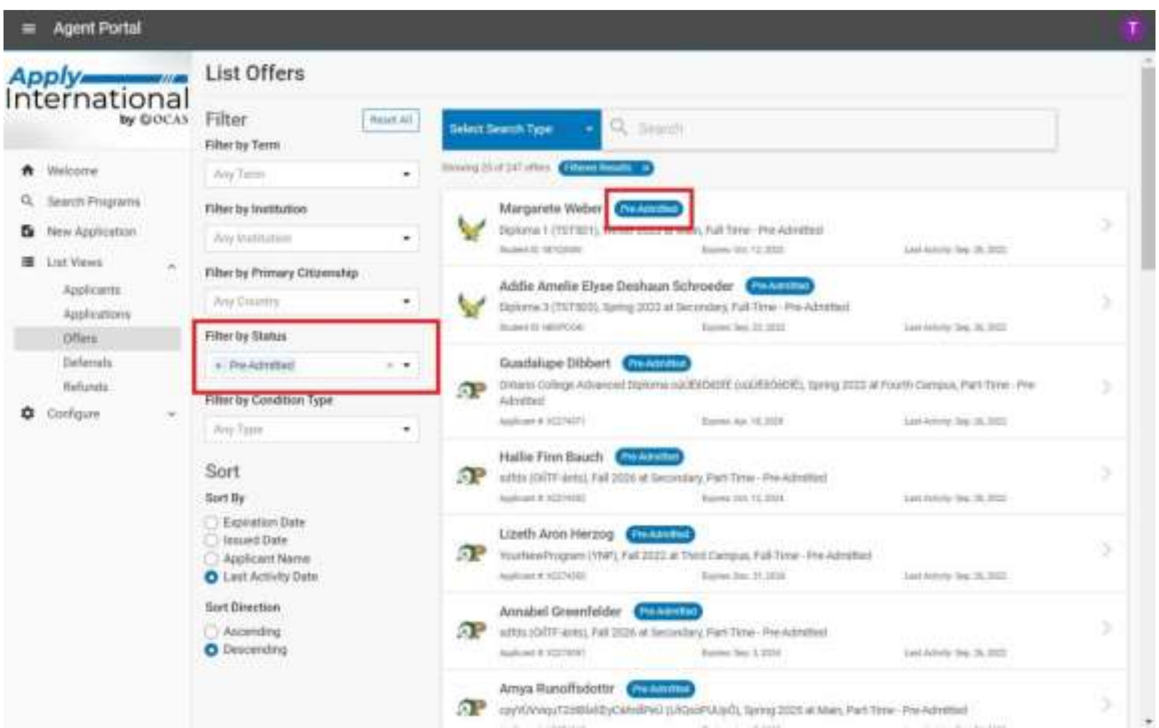
INSTITUTIONAL INFORMATION

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

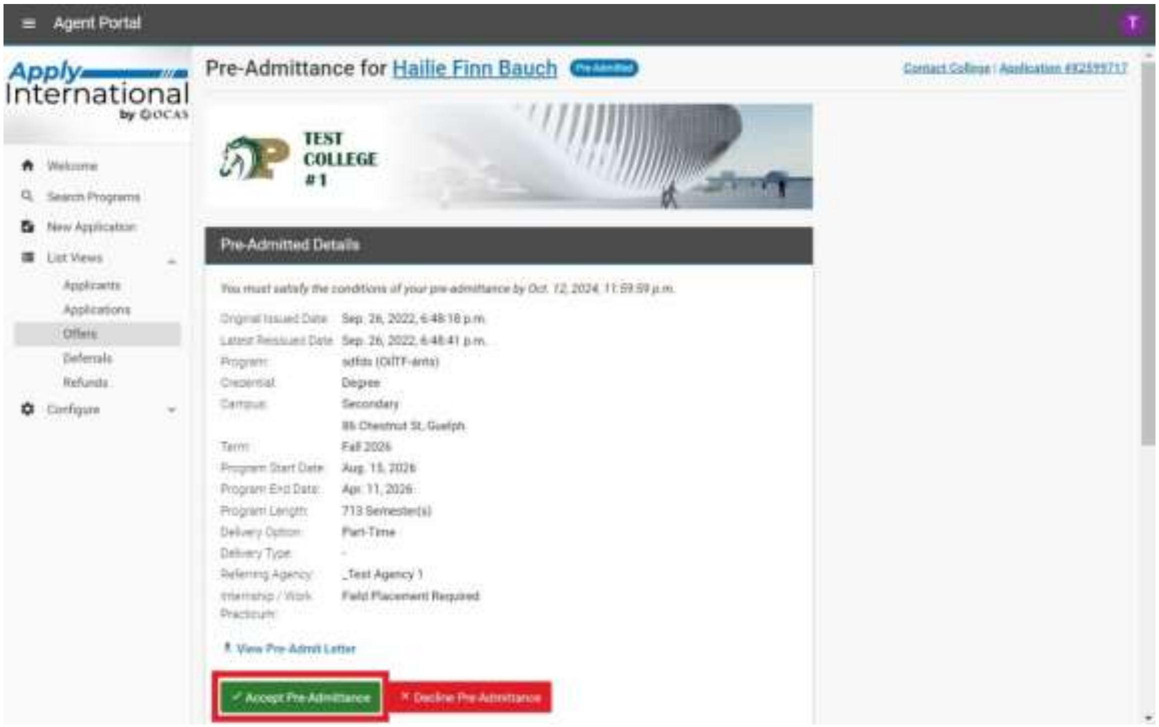
The status will show as “Pre-Admitted” in your Agent Portal.

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.

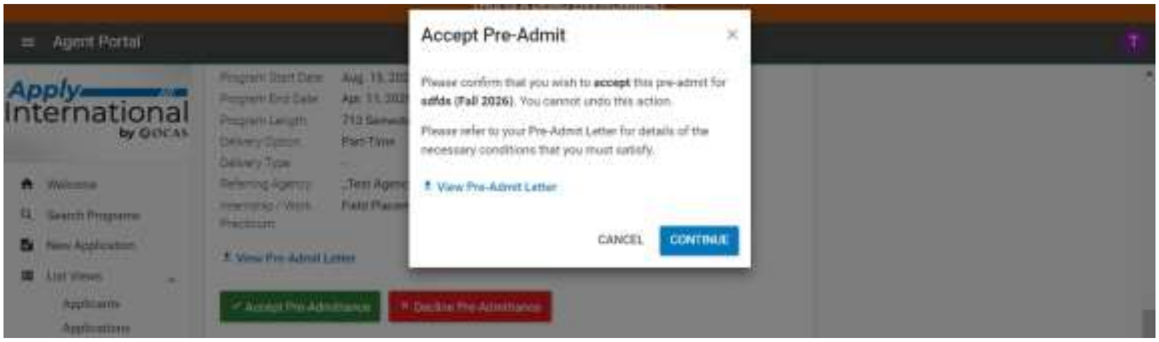
1. On the List Offers page, Filter by Status = **Pre-Admitted**.
2. Select the item from the list that contains the Pre-Admitted state.



3. On the Pre-Admittance details page, click **Accept Pre-Admittance**.



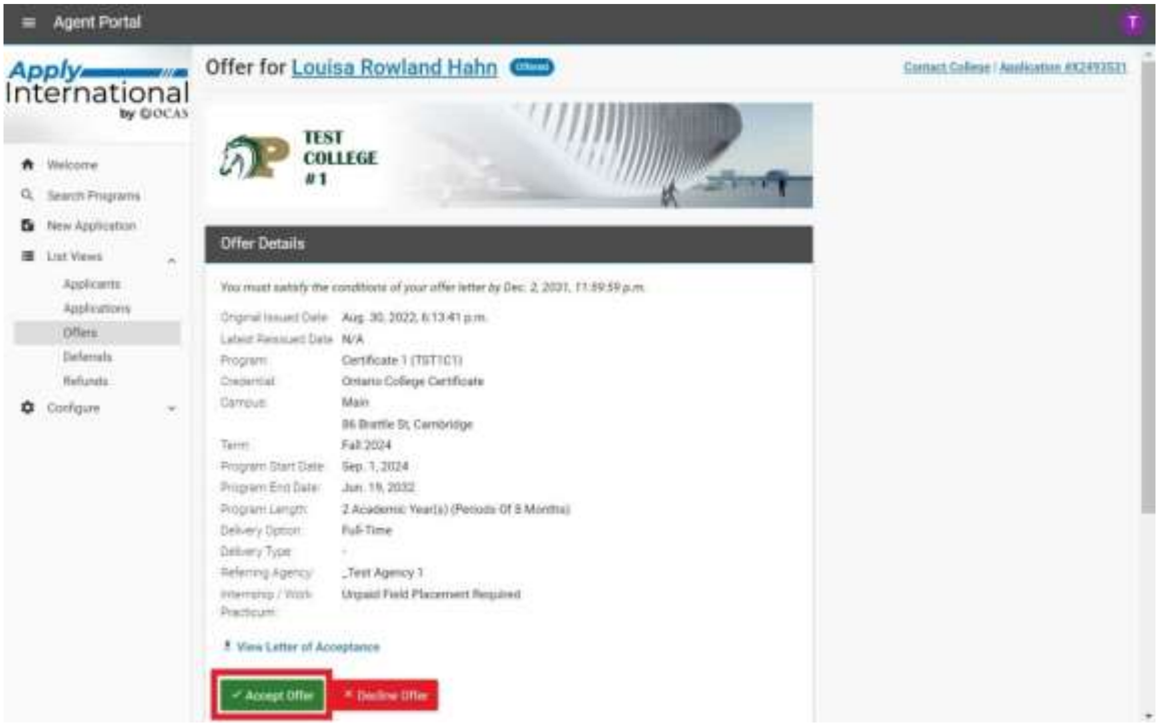
4. A confirmation message will appear. Read the information provided and click **Continue**.



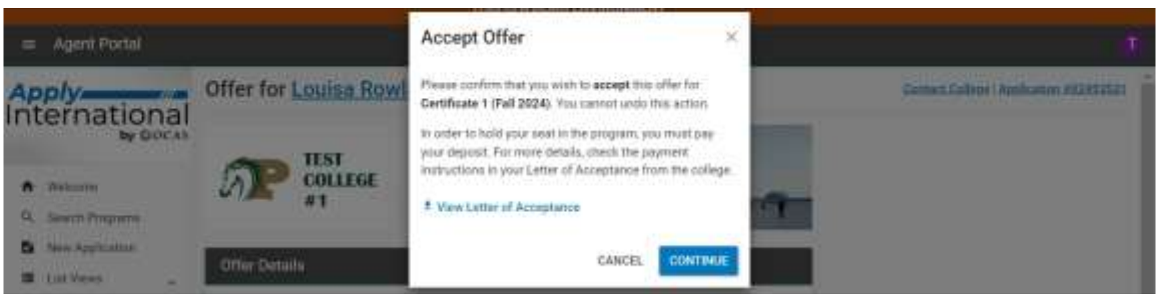
Once the college acknowledges that the necessary conditions of the Pre-Admit have been addressed, the college will issue a standard Offer (with an updated Letter of Acceptance).

Accept an Offer

1. On the Offer details page, click **Accept Offer**.



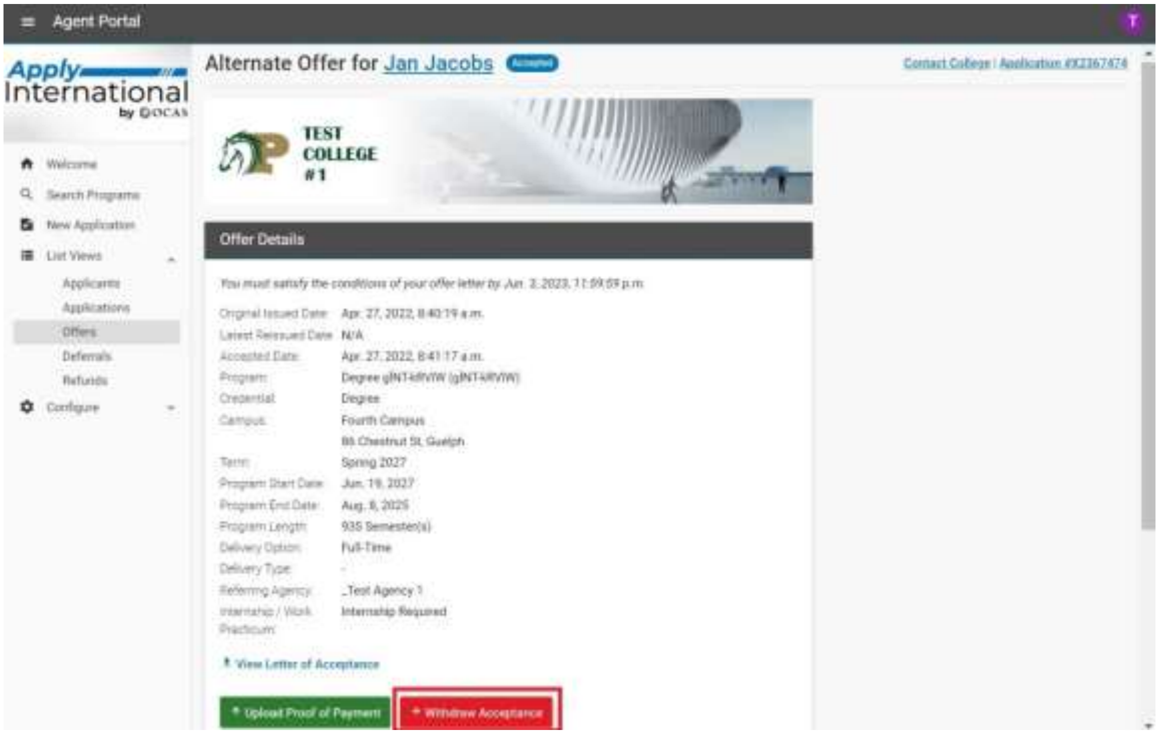
2. A confirmation message will appear. Read the information provided and click **Continue** to confirm acceptance of the offer.



Both the agent and applicant can Accept an offer, Decline an offer, or Withdraw Acceptance of an offer.

Withdraw an Accepted Offer

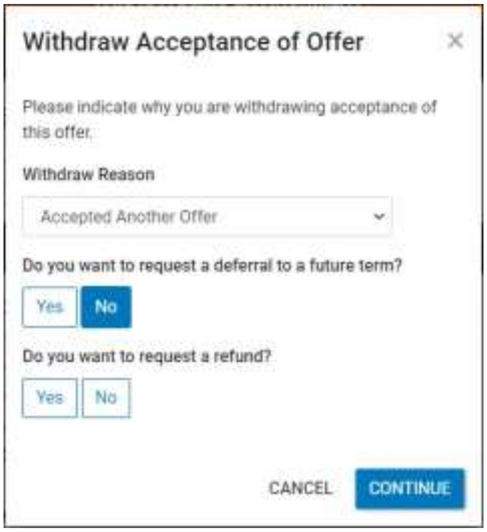
1. From the Dashboard view, click the **Offers** link under List Views on the left.
2. Select the offer you wish to view.
3. On the offer details page, click **Withdraw Acceptance**.



4. A confirmation message will appear. Read the information provided and select the withdraw reason from the dropdown.

5. If you wish to request a deferral, click **Yes**. When you click **Continue** you will be taken to the deferral request screen.

   If you select **No**, you will be asked if you wish to request a refund.

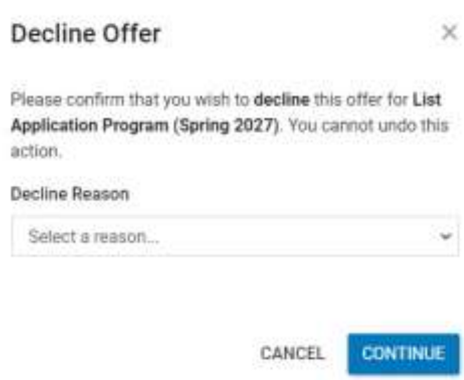


6. If you select **Yes**, you will be taken to the refund request screen when you click **Continue**.
7. If you selected 'No' for both options, the offer status will be changed to 'Withdrawn,' and there will still be the option to request a deferral or refund later from the offer screen.

Decline an Offer

New in the October 2022 release: If an agent or applicant decides to decline an offer, they must provide a reason.

1. On the Offer details page, click **Decline Offer**.
2. A confirmation message will appear. Read the information provided and select a **Decline Reason** from the list.



Available reasons for declining an offer include:

- Accepted Offer of Another Institution in Another Country

  Agent or applicant may provide the country.

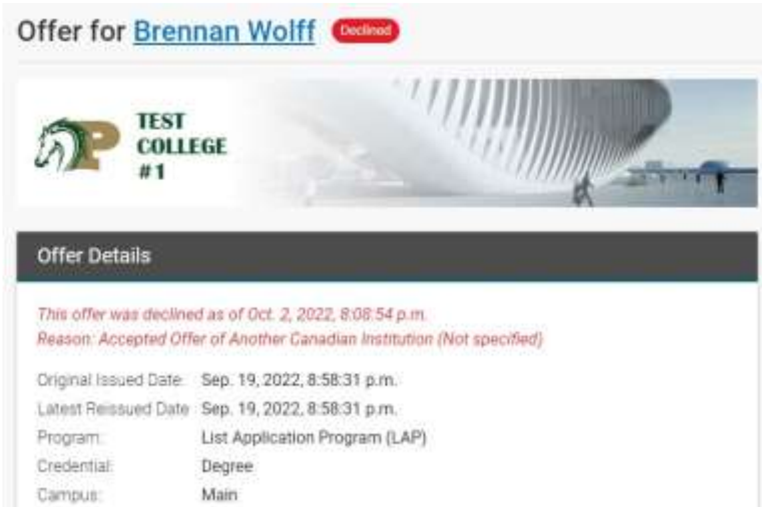
- Accepted Offer of Another Canadian Institution

  Agent or applicant may provide the name of the Institution.

- Financial Problem
- Family Problem
- Other (Enter a reason)

3. Click **Continue**.

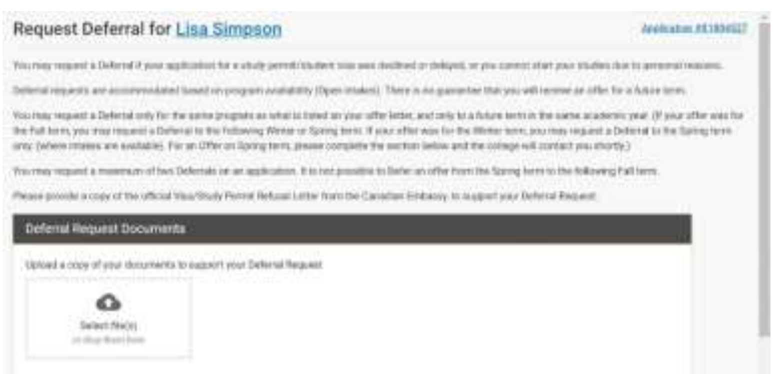
   The Offer page opens, and the Declined status and reason are displayed at the top of the page.



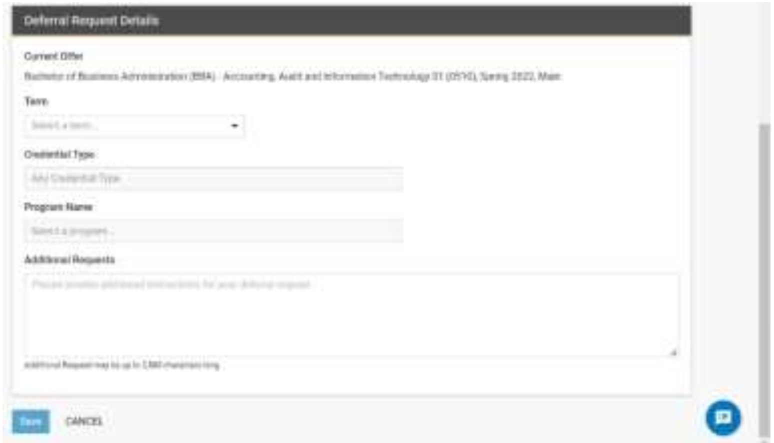
Request a Deferral

In a case where the acceptance of an offer has been withdrawn after a payment is made, the agent can request a deferral.

1. On the Offer details page of a withdrawn offer, click **Request Deferral**.



2. On the Deferral Request page, you can submit documents to support your deferral request.
3. In the Deferral Request Details section, select a **Term**, **Credential Type**, and **Program Name** from the lists.
4. In the **Additional Requests** text box, provide additional information to support the deferral request; then click **Save**.



Request a Refund

If you have withdrawn acceptance of an offer but the applicant doesn't wish to defer, you can request a refund instead.

1. On the offer details page of a withdrawn offer, click **Request Refund**.

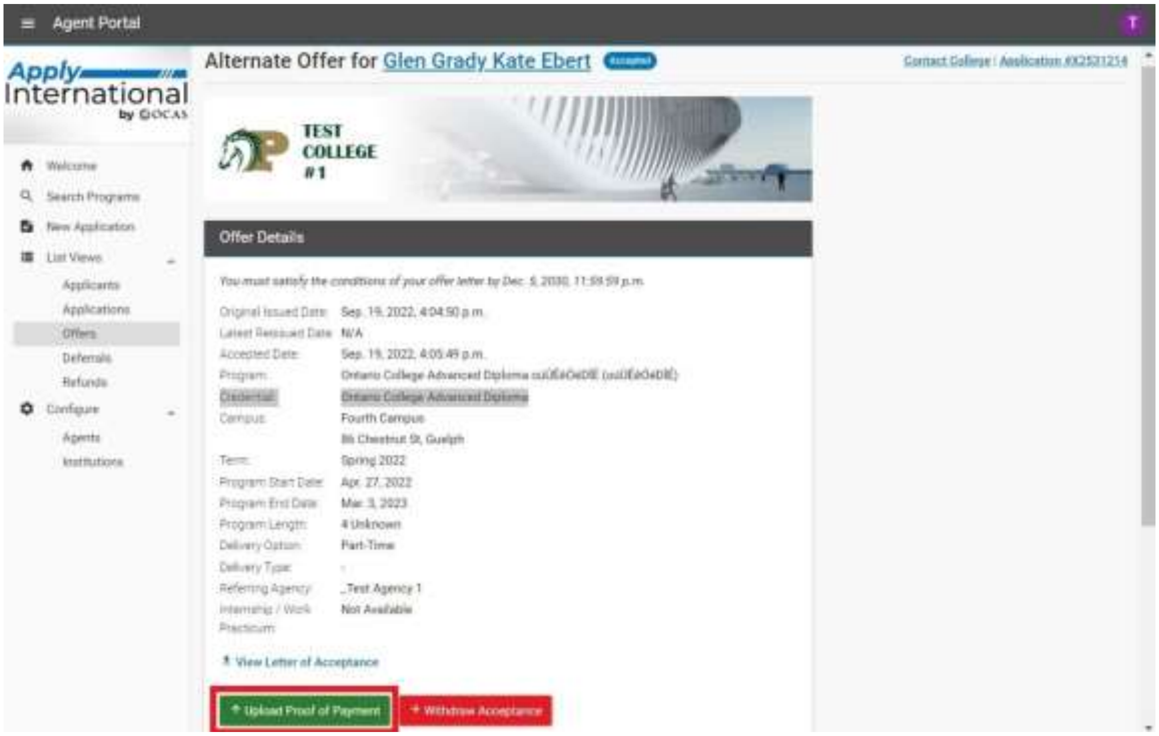
2. In the Refund Request Details section, upload documents to support the request.
3. In the **Additional Requests** text box, provide additional information to support the refund request; then click **Save**.

Refund requests can be tracked in the Refund list.

Upload Proof of Payment

After an offer or pre-admission has been accepted, a proof of payment can be uploaded to show that the payment condition of the offer has been met.

1. Click **Upload Proof of Payment**.



2. Upload the digital receipt and click **Save + Continue**.

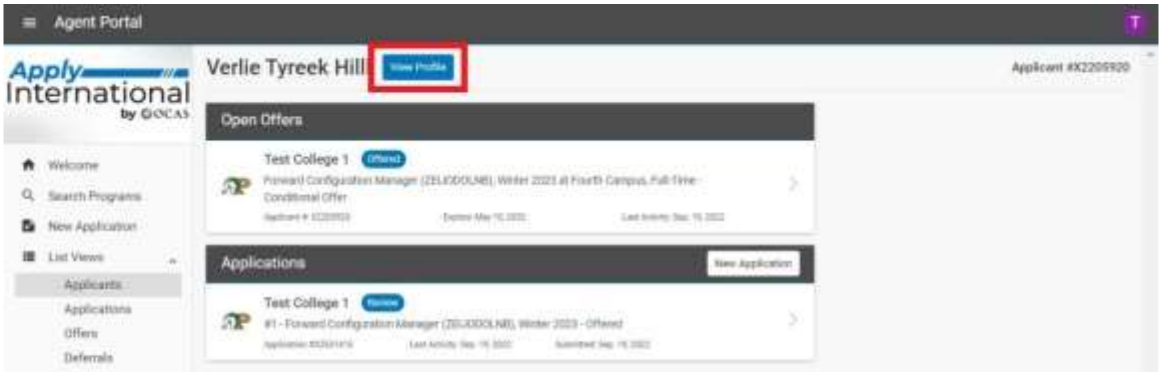
   After a document has been added, it will show up at the bottom of the Offers page, in the Proof of Payment section.

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.

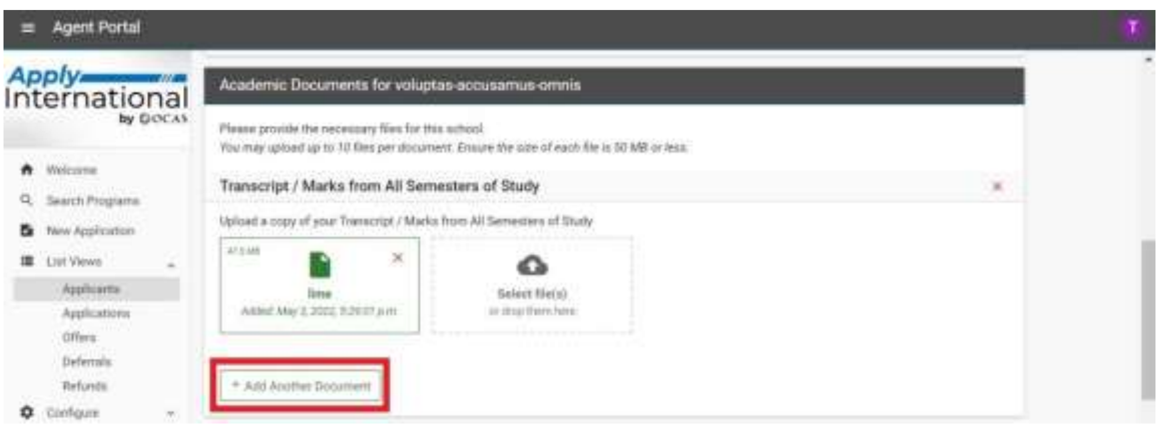
4. Click on the Applicant's name at the top to go to the Applicant dashboard page.

5. On the Applicant dashboard page, click **View Profile**.



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 **+ Add Another Document**, then select the relevant file from your computer to upload.



View Deposit / Payment Receipts

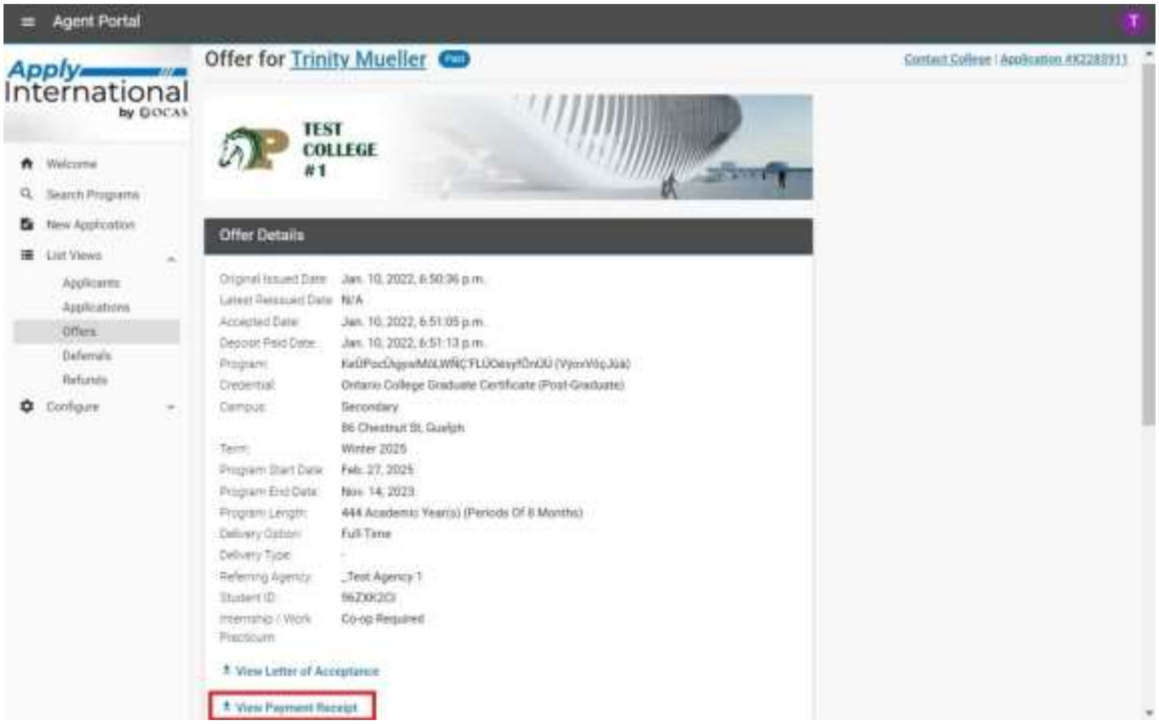
Once the college receives the necessary payment (deposit amount or tuition amount), as defined in the Letter of Acceptance, the Offer state will change to Paid. A payment receipt is available for download in the portal in order to assist the visa or study permit application.

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 **View Payment Receipt**.

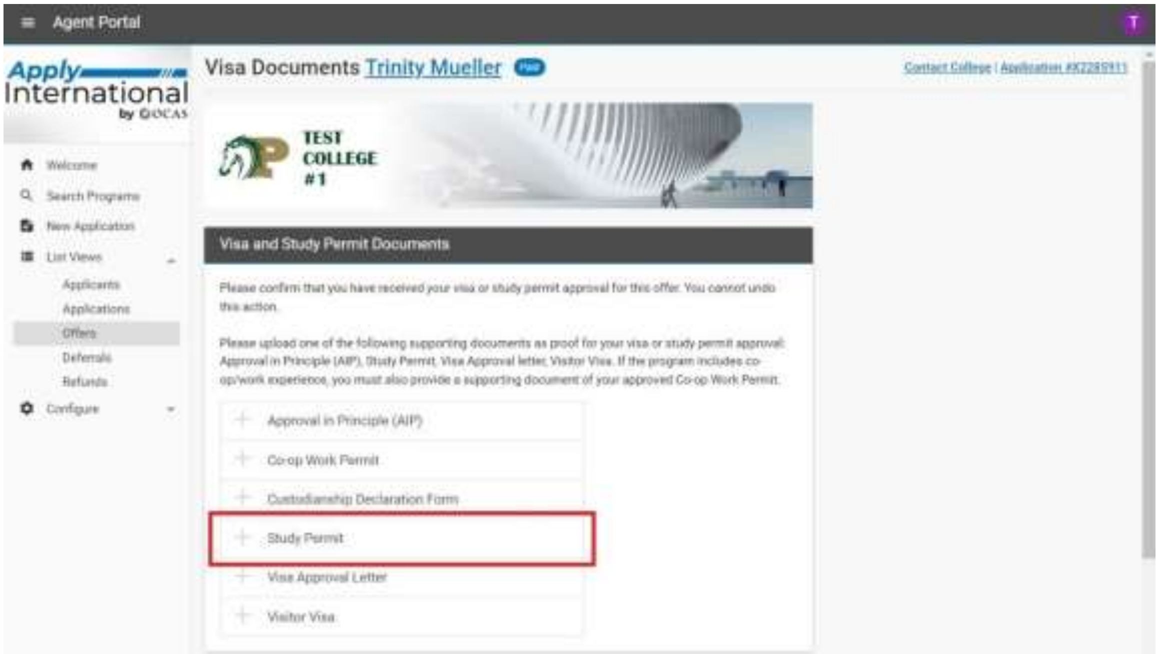


Upload Visa / Study Permit

When the applicant’s Visa or Study Permit application is approved, notify the college through the portal.

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 **Visa Received**.

4. You will be brought to a page where you must upload Visa or Study Permit information.

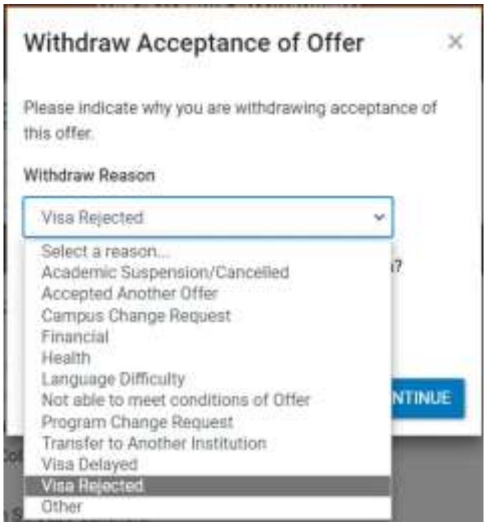


5. Click + Add Another Document and select the type of document you wish to upload.
6. Select the relevant file from your computer to upload.
7. Click **Save + Continue**.

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.



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.

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.

The offer state will be changed to Withdrawn and the reason will appear at the top of the Offer details page.

Offer Revoked

A college may Revoke an offer for various reasons.

- Acceptance Deadline Passed
- Campus Change
- Did Not Show Up
- No Seats Available in the Selected Intake
- Payment Not Received
- Program Change
- Transfer to Another Institution
- Visa Delayed
- Visa Rejected
- Other (Enter a reason)

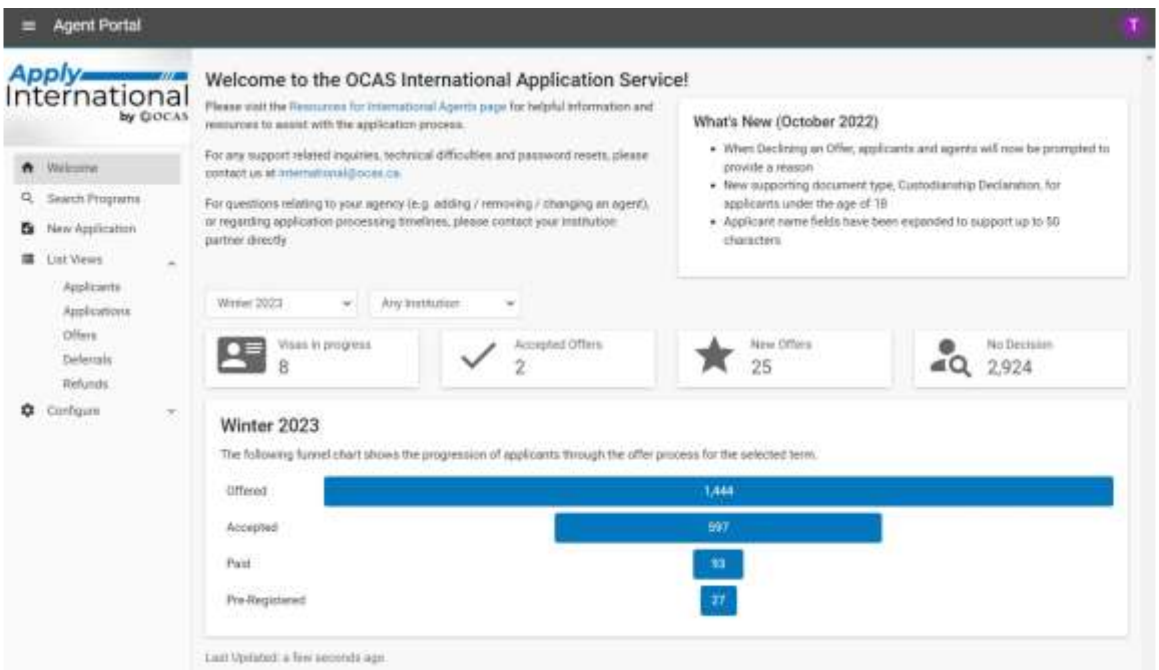
Both you and the applicant will receive an email notifying you if an offer has been revoked. No further actions are available when an offer shows as ‘Revoked’.

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:

- What’s New lists the key new features in the current release
- Summary counts of applicants at key stages: Visas in progress, Accepted Offers, New Offers, and No Decision
- Funnel chart showing the number of applications at each stage of the process: Offered, Accepted, Paid, and Pre-Registered
- Offers expiring soon

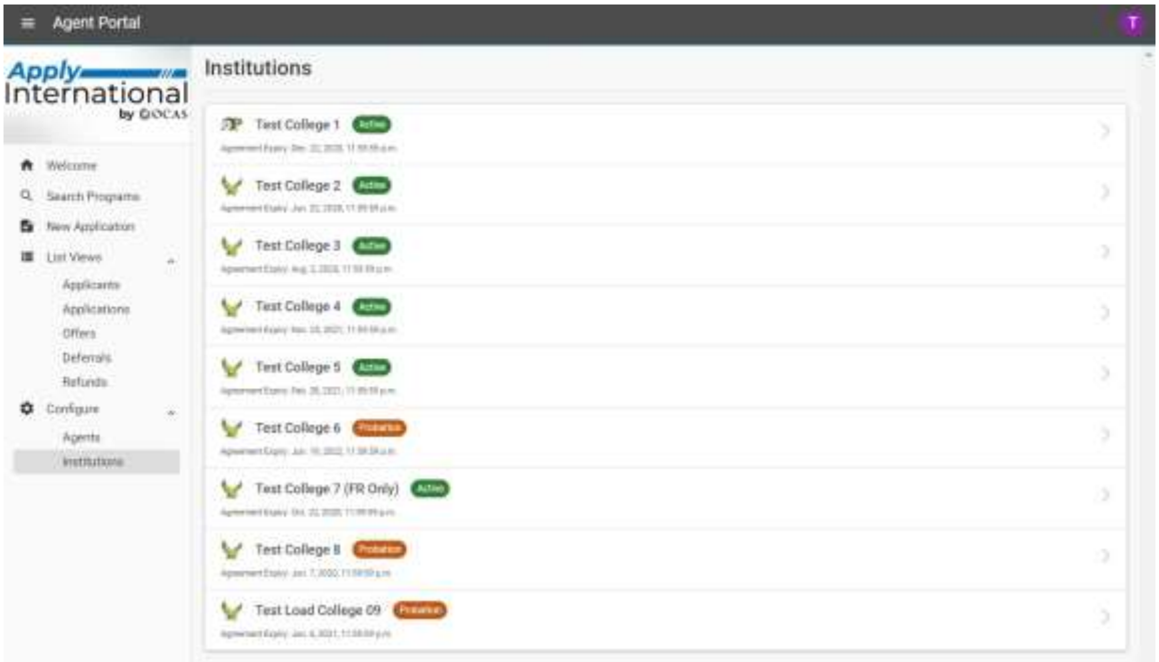
By default, the Dashboard data is filtered for a single term. You can filter the data by term or by institution.



Viewing College Information

Agency Managers can view a list of colleges that they have an active agreement with, including the college's basic contact information, agreement information/details and commission information. This menu allows managers to quickly find information about their college partners.

The agency manager can find the information under the Configure > Institutions menu.



1. To view the details about a particular Institution, click the name in the list.

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 Status

- **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 it's determined 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.
- **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)

Note: 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".