



International Application Service

Agent Portal User Guide

Updated: October 2022

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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.

The image shows a screenshot of the OCAS International Agent Portal login page. At the top left is the OCAS logo, and at the top right is the word "Français". Below the header is a banner image of a woman and a man smiling. The main heading reads "Sign in to the OCAS International Application Service (IAS) Agent Portal". Below this, there is a back arrow icon followed by the email address "testagent1@test.ocas.ca". The next section is "Enter password" with a password input field containing several asterisks and a toggle icon for visibility. Below the password field is a checkbox labeled "Remember Me" and a link "Forgot password?". At the bottom right is a blue "Sign in" button. At the very bottom of the page are links for "Contact Us", "Privacy", and "Terms of Use".

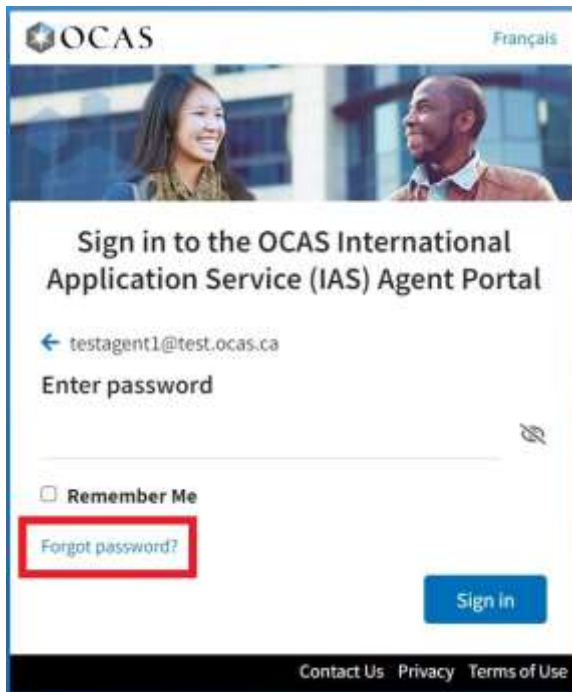
3. Click **Sign in**.

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



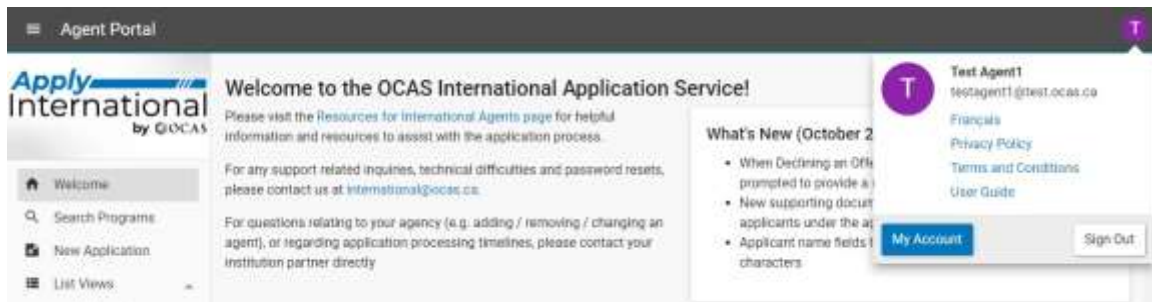
- At least three of the following:
 - a lowercase letter (a-z)
 - an uppercase letter (A-Z)
 - a number (0-9)
 - at least one of these special characters:
@ # \$ % ^ & * - _ + = [] { } | \ : ' , ? / ` ~ " () ; .

8. Click **Create**.

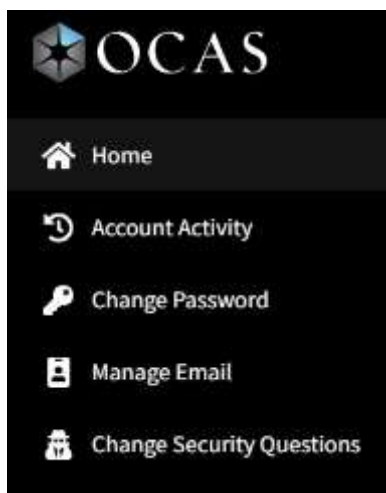
Change Password When Signed In

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**.

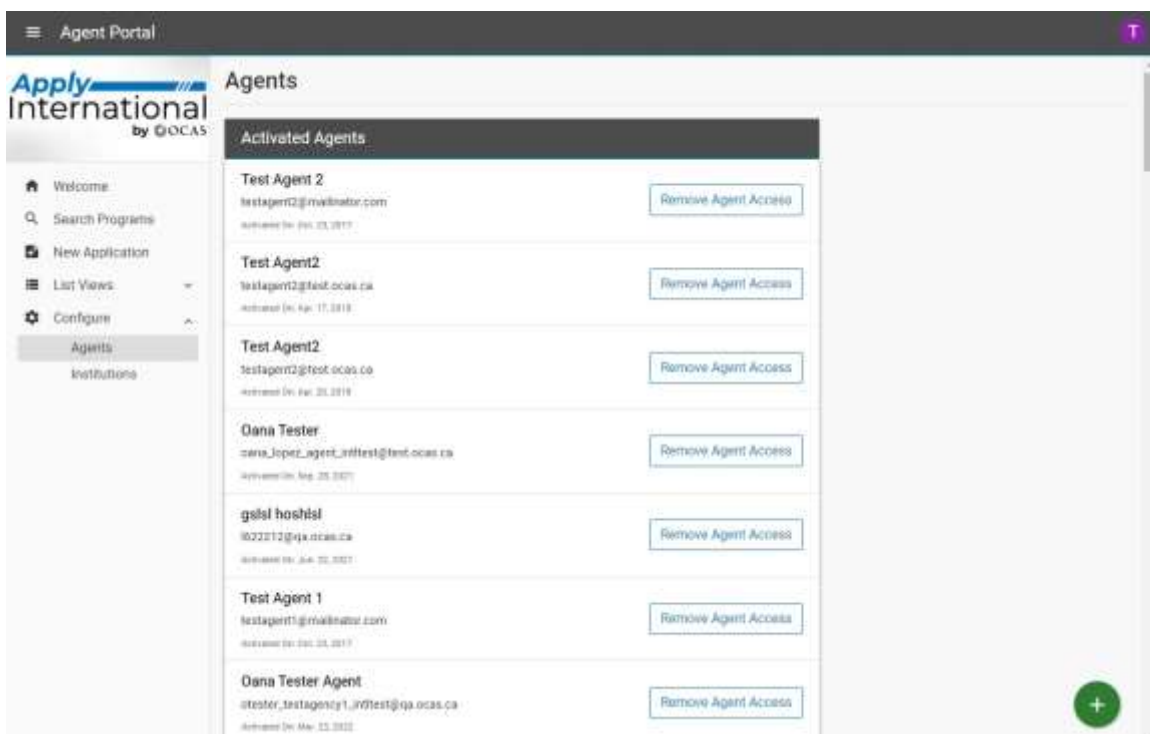
You will be logged out and prompted to log back in with the new password.

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.

The screenshot shows the 'Add an Agent' interface. On the left is a navigation menu with options like 'Welcome', 'Search Programs', 'New Application', 'List Views', 'Configure', 'Agents', and 'Institutions'. The main area is titled 'Add an Agent' and contains a 'New Agent Details' form. The form has three input fields: 'Name' (with a placeholder 'Name'), 'Email' (with a placeholder 'email@sample.com'), and a toggle switch for 'Is this agent an agency manager?' which is currently set to 'No'. At the bottom of the form are 'Save' and 'CANCEL' buttons.

If an agent does not receive their registration email, the agency manager can resend 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.

Dan Ayson dayson@qa.ocas.ca Agent has not registered. Email Last Sent: Jan. 28, 2021	Resend Registration Email
Contact Name ts11_testagent1@qa.ocas.ca Agent has not registered. Email Last Sent: Jan. 23, 2021	Resend Registration Email

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.

Activated Agents	
Test Agent 2 testagent2@mailinator.com Activated On: Oct. 23, 2017	Remove Agent Access
Test Agent2 testagent2@test1.ocas.ca Activated On: Apr. 17, 2018	Remove Agent Access

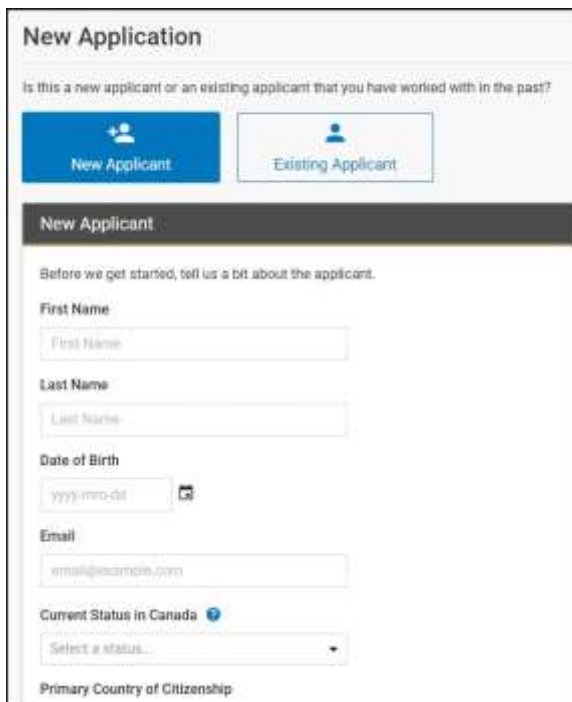
Creating and Submitting An Application

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



The screenshot shows a web form titled "New Application". At the top, it asks "Is this a new applicant or an existing applicant that you have worked with in the past?" and provides two buttons: "New Applicant" (highlighted in blue) and "Existing Applicant". Below this, the "New Applicant" section is active. It contains the instruction "Before we get started, tell us a bit about the applicant." followed by several input fields: "First Name" (with a placeholder "First Name"), "Last Name" (with a placeholder "Last Name"), "Date of Birth" (with a placeholder "yyyy-mm-dd" and a calendar icon), "Email" (with a placeholder "email@ocmpro.com"), "Current Status in Canada" (a dropdown menu with "Select a status..." and a blue information icon), and "Primary Country of Citizenship" (a label for the next field).

Click **Continue**.

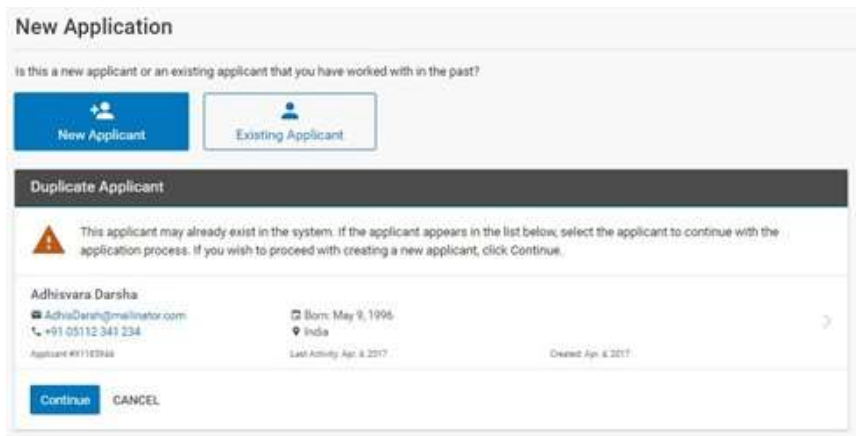
Note: Please enter the applicant's name exactly as it is shown on their Passport.

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.



The screenshot shows a web form titled "New Application". At the top, it asks "Is this a new applicant or an existing applicant that you have worked with in the past?" with two buttons: "New Applicant" (highlighted in blue) and "Existing Applicant". Below this is a "Duplicate Applicant" section with a warning icon and text: "This applicant may already exist in the system. If the applicant appears in the list below, select the applicant to continue with the application process. If you wish to proceed with creating a new applicant, click Continue." A list of applicant information is shown for "Adhisvara Darsha", including email "AdhisDarsh@gmailinator.com", phone "+91 05112 341 234", birth date "Born: May 9, 1996", and location "India". At the bottom of the list are buttons for "Continue" and "CANCEL".

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.



The screenshot shows a dialog box titled "Duplicate Applicant" with a close button (X) in the top right corner. The text inside reads: "This applicant may already exist in the system. Please confirm that the applicant does not already have a record with International ontariocolleges.ca." At the bottom of the dialog are two buttons: "CANCEL" and "CONTINUE".

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**.

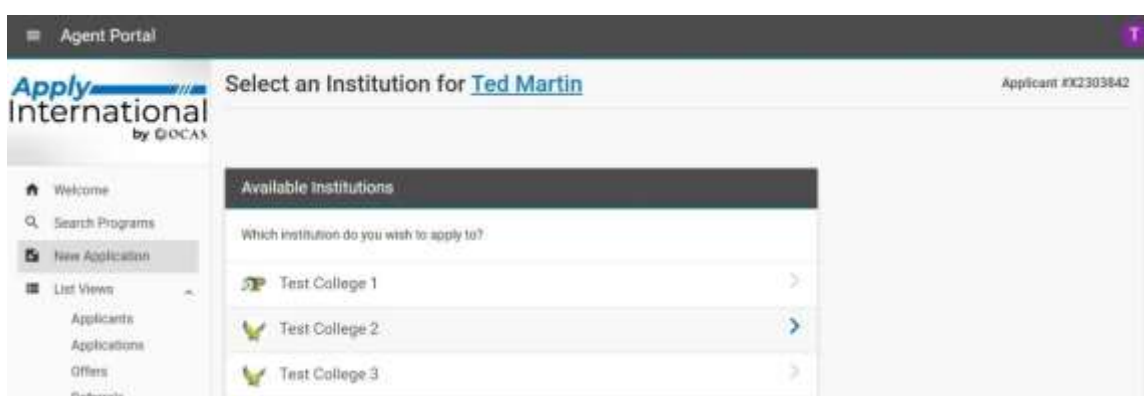
Note: Duplicate Applications create challenges for college admissions staff and slow down the application processing time. Please avoid creating duplicate applications wherever possible.

Select a College

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

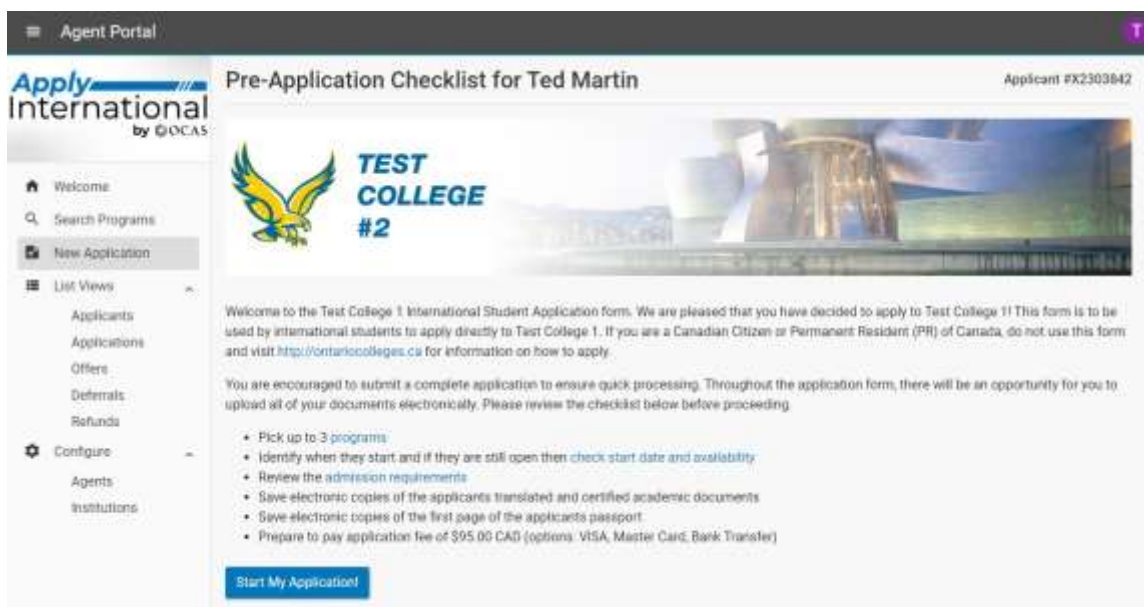
You will only be able to view the colleges using our system that you have a current agreement with.

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.

The screenshot displays the 'Agent Portal' interface. On the left is a sidebar with a navigation menu including 'Personal Information', 'Agency and Referrals', 'Program Selection', 'Education', 'Supporting Documents', 'Review', and 'Payment Status'. The main content area is titled 'Application for Ted Martin' and 'Personal Information'. It features a 'Basic Information' section with the following fields: 'Title (Optional)' (dropdown), 'First Name' (text input: Ted), 'Middle Names (Optional)' (text input: Middle Name), 'Last Name' (text input: Martin), and 'Suffix (Optional)' (dropdown). Below these is a 'Legal Name' field showing 'Legal Name: Ted Martin' and a confirmation question: 'The above name is the same as what appears on my legal documentation.' with 'Yes' and 'No' buttons.

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.**



The screenshot shows the 'Agent Portal' interface for 'TEST COLLEGE #2'. The main heading is 'Application for Pat Roberts' with a 'Web' icon. The page title is 'Agency and Referrals'. On the left, a navigation menu includes: Personal Information, Agency and Referrals (selected), Program Selection, Education, Supporting Documents, Review, and Pay and Submit. The main content area has three sections: 'Agent Details' with a text box for agency name and an authorization checkbox; 'Referral Details' with a question about exchange/partnership schools and 'Yes/No' buttons; and 'Existing Student Information' with a similar question and buttons. A 'Save + Continue' button is at the bottom.

Program Selections

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

The screenshot shows the 'Apply Admin - International' interface for 'DEMO 1 COLLEGE'. The main heading is 'Application for Pat Roberts' with a 'Web' icon. The page title is 'Program Selection'. On the left, a navigation menu includes: Personal Information, Agency and Referrals, Program Selection (selected), Education, Supporting Documents, Review, and Pay and Submit. The main content area has a heading 'Choose the option that best describes your proficiency in English:' followed by six radio button options: 1) completed English proficiency test (TOEFL/IELTS) with scores at Supporting Documents; 2) will be completing English proficiency test with completion date at Education step; 3) completed or will be completing English Study Program at private/partner language school with letter/certificate at Supporting Documents; 4) wish to apply for English for Academic Purposes (EAP/ESL) program and postsecondary program(s); 5) wish to apply for English for Academic Purposes (EAP/ESL) program; 6) My first language is English / None of the provided options are applicable; 7) This is a demo program selection option (See for More Details).

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.

The screenshot shows the 'First Program Choice' form in the Agent Portal. The form includes the following fields and options:

- Term:** Winter 2022
- Credential Type:** Ontario College Diploma
- Program Name:** Diploma I (15T2D1)
- Select a campus and start date:**

Campus	Start Date	Availability
<input type="checkbox"/> Main	Jan 4, 2022	Open
<input checked="" type="checkbox"/> Secondary	Jan 4, 2022	Open
- Credential:** Ontario College Diploma
- Approximate Program Completion Date:** Jan 4, 2023
- Length:** 3 Month(s)
- Buttons:** '+ Add Another Program' and 'Save + Continue'

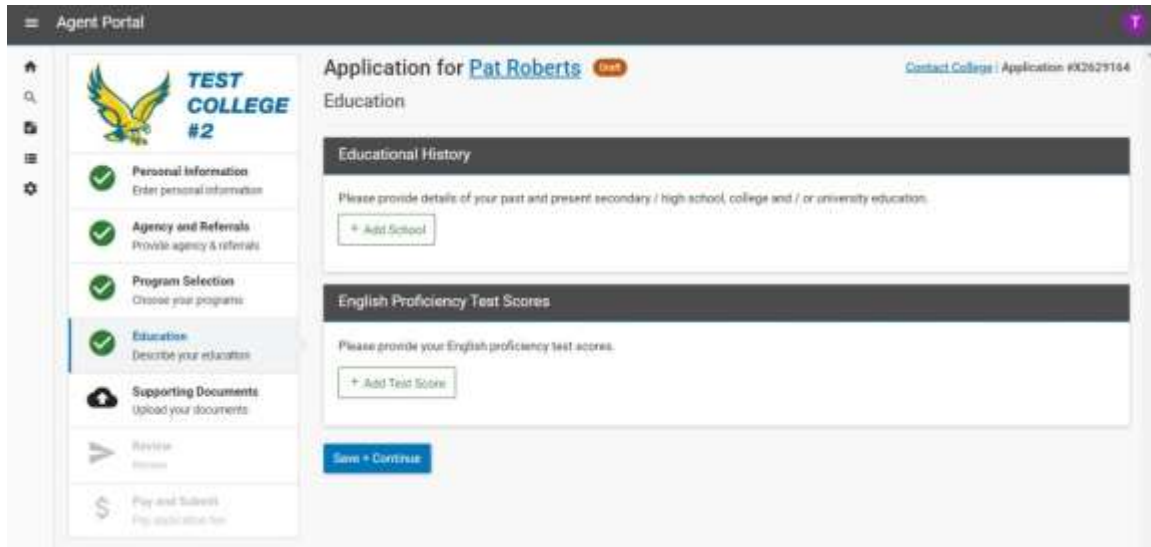
Note: You may select a program only if it has a Campus + State Date with an Open or Waitlisted availability. You may not apply to a Closed intake for a program.

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.



The screenshot shows the 'Agent Portal' interface for an application for Pat Roberts. The left sidebar contains a navigation menu with the following items: Personal Information (Enter personal information), Agency and Referrals (Provide agency & referrals), Program Selection (Choose your programs), Education (Describe your education), Supporting Documents (Upload your documents), Review (Review), and Pay and Submit (Pay application fee). The main content area is titled 'Application for Pat Roberts' and 'Education'. It features two sections: 'Educational History' with a prompt 'Please provide details of your past and present secondary / high school, college and / or university education.' and a '+ Add School' button; and 'English Proficiency Test Scores' with a prompt 'Please provide your English proficiency test scores.' and a '+ Add Test Score' button. A 'Save + Continue' button is located at the bottom of the form.

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

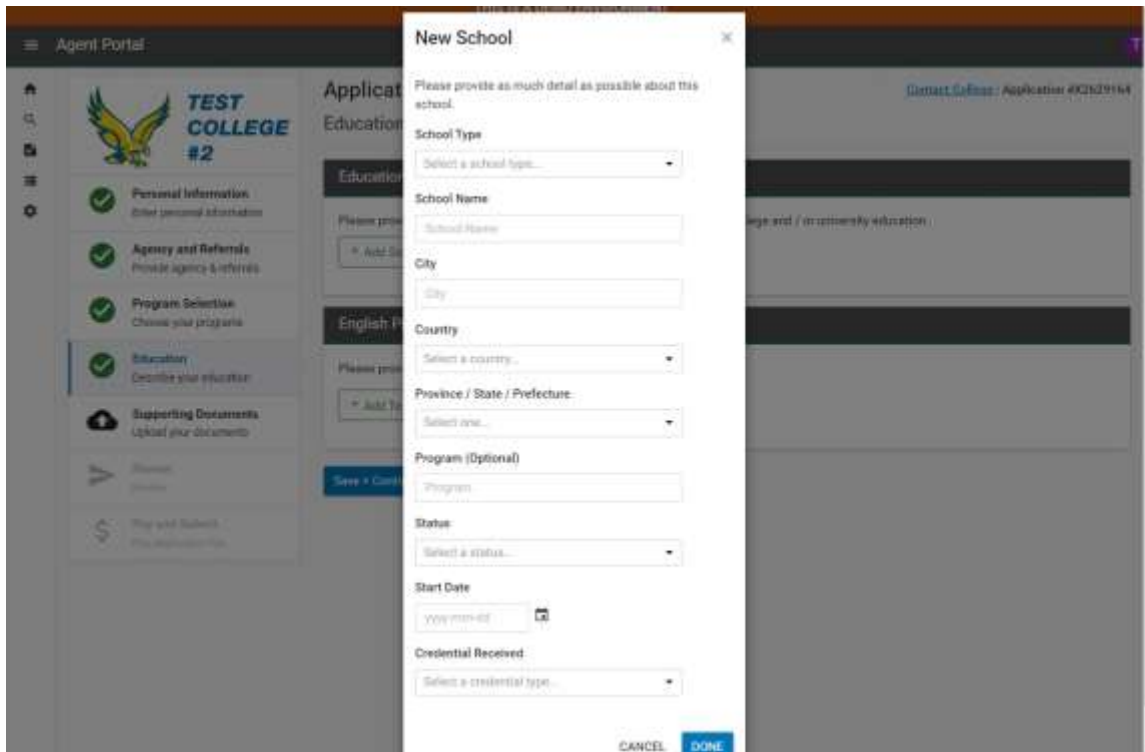
The following is a description of Credential Received options:

- 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.

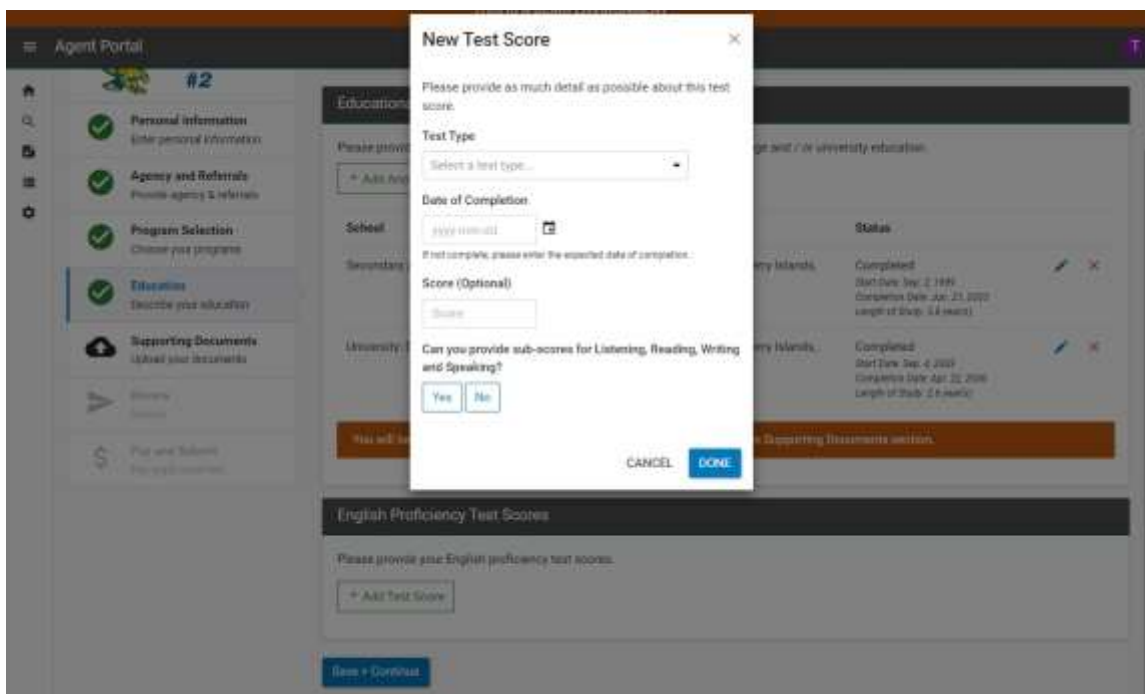


Adding English Proficiency Test Scores

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 screenshot shows the 'Agent Portal' interface for an application for Pat Roberts. The page is titled 'Supporting Documents' and is organized into two main sections: 'Proof of Citizenship' and 'Academic Documents for ABC Secondary'. The 'Proof of Citizenship' section includes a list of document types: Birth Certificate, Citizenship Papers, Convention Refugee Document, Marriage Certificate, Passport, and Permanent Resident Card. The 'Academic Documents for ABC Secondary' section includes a list of document types: Advanced Certificate of Secondary Education (ACSE), Articulation Approval, and Caribbean Advanced Proficiency Examination (CAPE). A sidebar on the left contains navigation options: Personal Information, Agency and Referrals, Program Selection, Education, Supporting Documents (highlighted), Review, and Pay and Submit.

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**

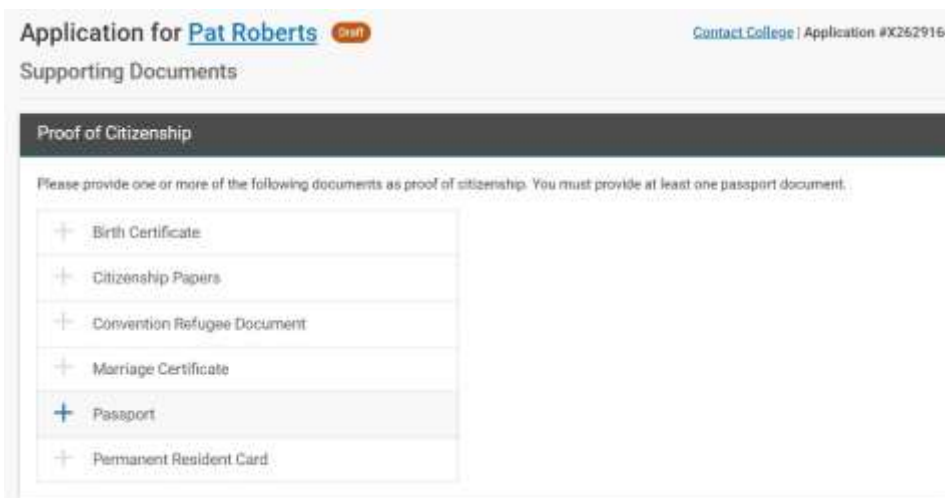
New for October 2022 release: The Custodianship Declaration Form has been added to the list of Visa documents. This document is sometimes required by IRCC when the applicant is considered a minor (under the age of 18).

- **Program Specific Document Requirements**

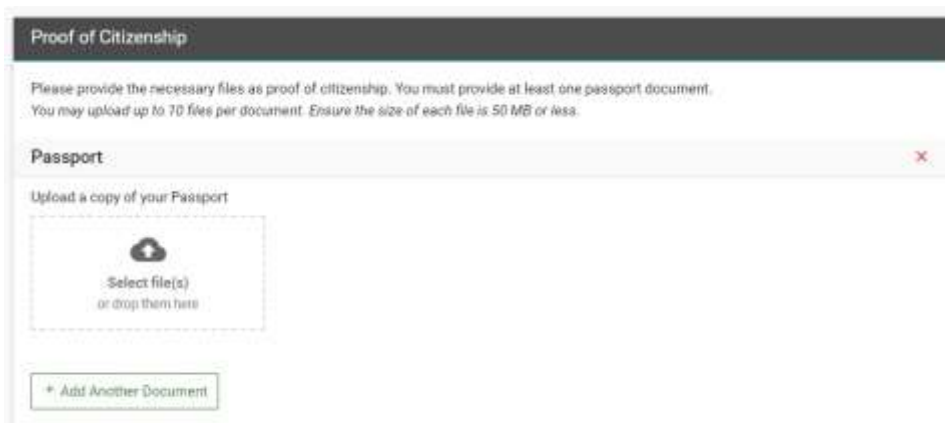
Examples: Portfolios, Proof of Deposit or Tuition Payment, Resume, or CV

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.

The screenshot shows a web interface for uploading a 'Proof of Citizenship' document. At the top, there is a dark header with the text 'Proof of Citizenship'. Below the header, a light gray box contains instructions: 'Please provide the necessary files as proof of citizenship. You must provide at least one passport document. You may upload up to 10 files per document. Ensure the size of each file is 50 MB or less.' Below this, a section titled 'Passport' has a close button (red X) in the top right corner. Underneath, it says 'Upload a copy of your Passport'. There are two main areas: on the left, a file card for 'Sample Passport for IAS on U...' (14 KB, added Oct 3, 2022, 12:57:18 p.m.) with a green document icon and a red X in the top right; on the right, a dashed box with an upload icon and the text 'Select file(s) or drop them here'. At the bottom left, there is a button labeled '+ Add Another Document'.

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.

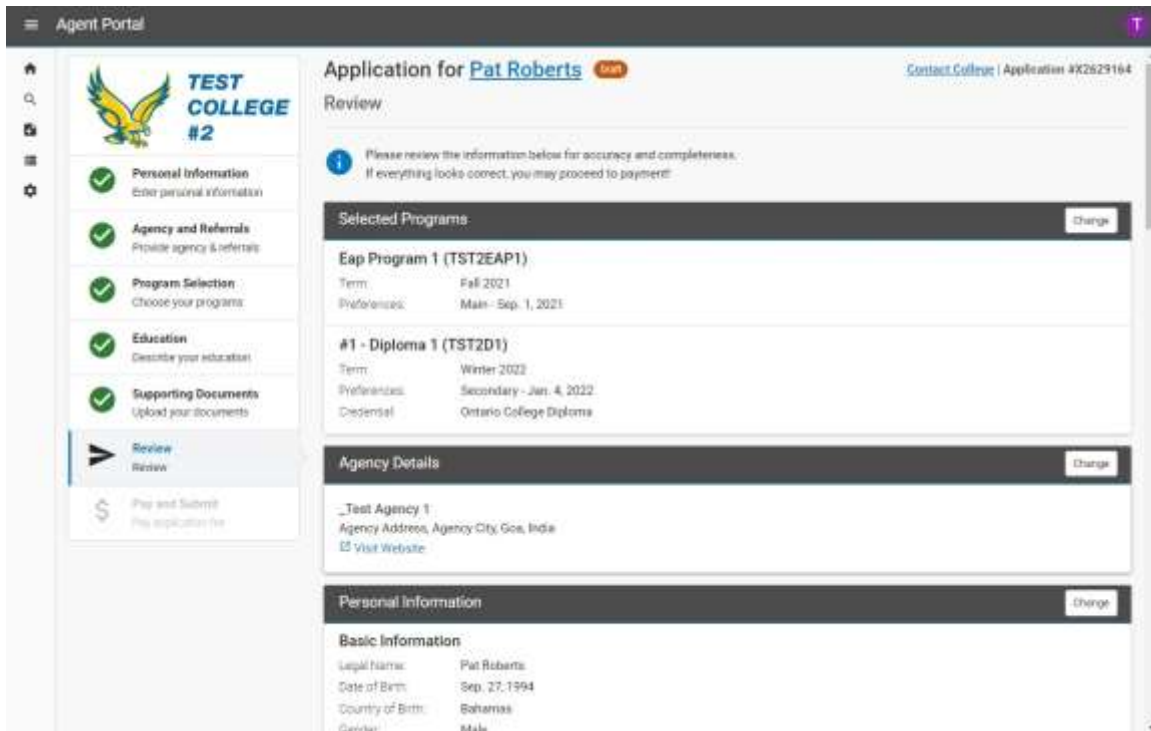
Is the Applicant Missing Required Documents?

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**.



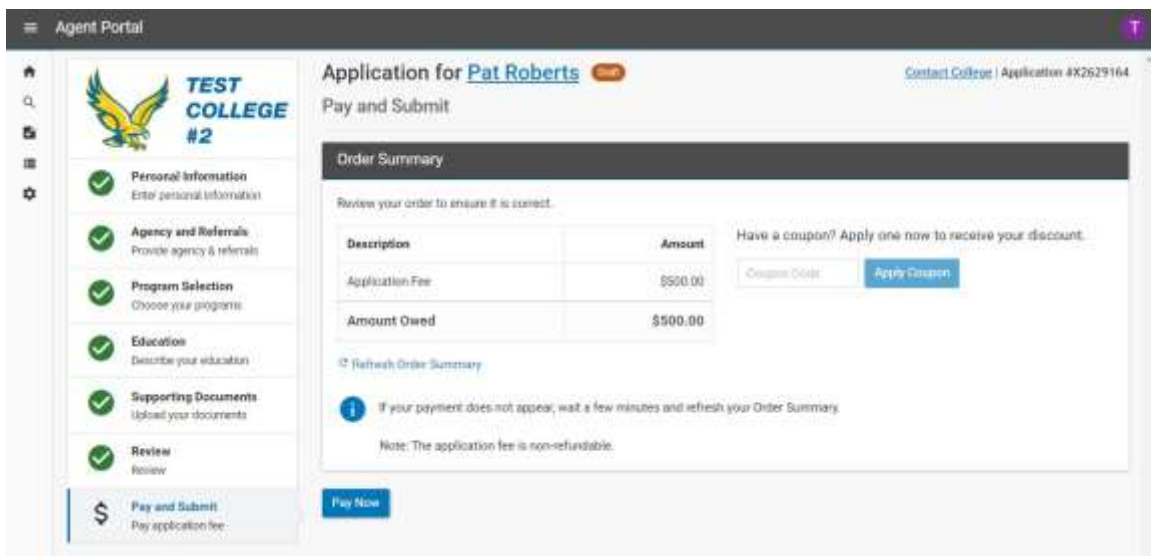
Pay and Submit

Review Order Summary and Apply Coupon Code

1. Review the Order Summary with the applicant.

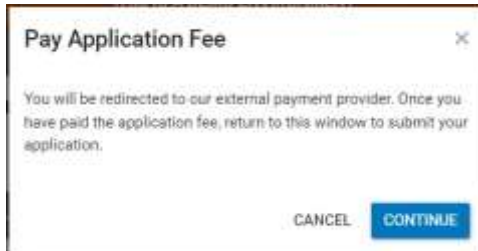
If there is an active Fee Waiver (as part of the agreement the Agency has with the particular college), then you will see the appropriate fee waiver reduction amount. No payment is required if the full application fee is waived.

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

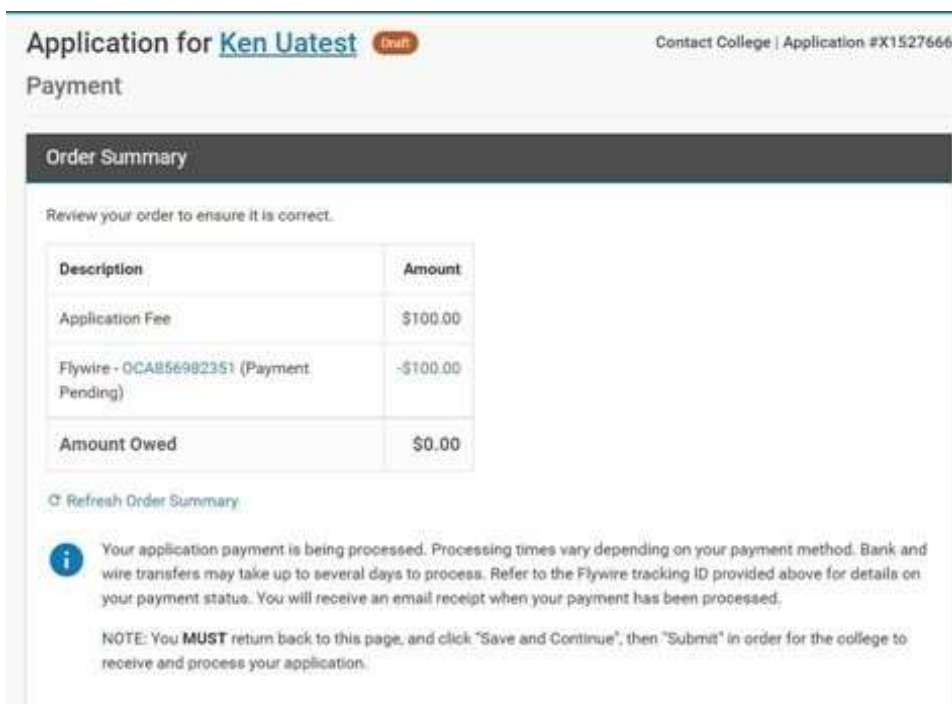
3. When you are ready to pay for the application, click **Pay Now**.
4. On the pop-up window, click **Continue**. You will be redirected to an external payment provider, Flywire, to complete the payment.



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.



Application for **Ken Uatest** draft Contact College | Application #X1527666

Payment

Order Summary

Review your order to ensure it is correct.

Description	Amount
Application Fee	\$100.00
Flywire - OCAS56982351 (Payment Pending)	-\$100.00
Amount Owed	\$0.00

[Refresh Order Summary](#)

i Your application payment is being processed. Processing times vary depending on your payment method. Bank and wire transfers may take up to several days to process. Refer to the Flywire tracking ID provided above for details on your payment status. You will receive an email receipt when your payment has been processed.

NOTE: You **MUST** return back to this page, and click "Save and Continue", then "Submit" in order for the college to receive and process your 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.



- After the payment status has been updated to Guaranteed, click **Submit**.
You will see a confirmation message on the next page.
- 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.

- Log in to your account
- From the Dashboard view, click the **Applicants** link under List Views on the left.

The list of Applicants will be displayed to the right.

The screenshot displays the 'List Applicants' interface. On the left, there is a sidebar with navigation options: 'Applicants' (selected), 'Applications', 'Offers', 'Deferrals', 'Refunds', and 'Configure'. The main area is titled 'List Applicants' and features a search bar at the top: 'Search by Name, Email, or Applicant #'. Below the search bar, there are filter options: 'Filter by Term' (Any Term), 'Filter by Institution' (Any Institution), and 'Filter by Primary Citizenship' (Any Country). There are also sorting options: 'Sort by' (Name, Country, Last Activity Date, Creation Date) and 'Sort Direction' (Ascending, Descending). The list shows 25 of 146,327 applicants. The visible entries are:

Name	Email	Phone	Birth Date	Country	Last Activity	Created
San Agentagenti Anzil	san.test.test@test.ocas.ca	+1 905-575-4444	Sept. 03, 2000	Austria	Oct. 7, 2021	Dec 2, 2020
Tsong Abarca Taffarel	AbarcaTaf_tccatent@test.ocas.ca	+81 9112 341 234	Feb. 20, 1971	Bangladesh	Feb. 18, 2019	Dec 16, 2019
Anvakti Abarca Taffarel	Abarca_tccatent@test.ocas.ca	+1 919-567-1234	Mar. 30, 1970	Indonesia	Oct. 13, 2021	Dec 21, 2020
Devasias Abarca Taffarel	AbarcaTaffa_tccatent@test.ocas.ca	+81 9112 341 234	Jan. 7, 1987	Russian Federation	Oct. 19, 2021	Dec 1, 2020
Ansumati Abarca Taffarel	AbarcaTaffa_tccatent@test.ocas.ca	+88-133-1234-5678	Jul. 11, 1961	Turkmenistan	Oct. 12, 2021	Dec 16, 2019
Jean-Marc Abarca Taffarel	AbarcaTaffa_tccatent@test.ocas.ca	+33 11 1111 1111	Aug. 11, 1990	France		

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

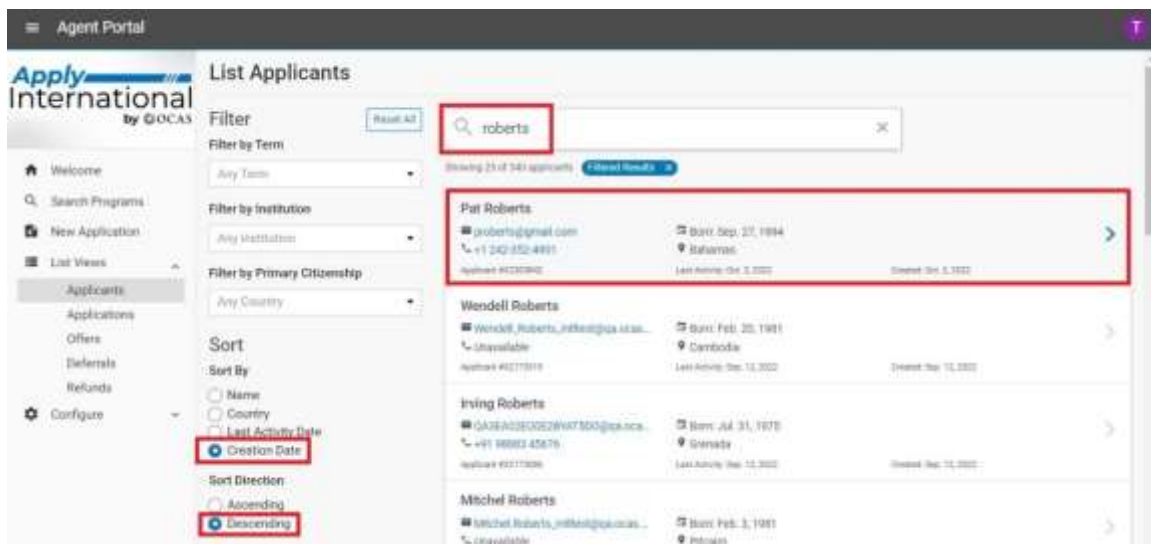
Select the filter that you would like to apply from the dropdowns to the left of the list. Applicants can be filtered by **Term**, **Institution**, or **Primary Citizenship**.

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.

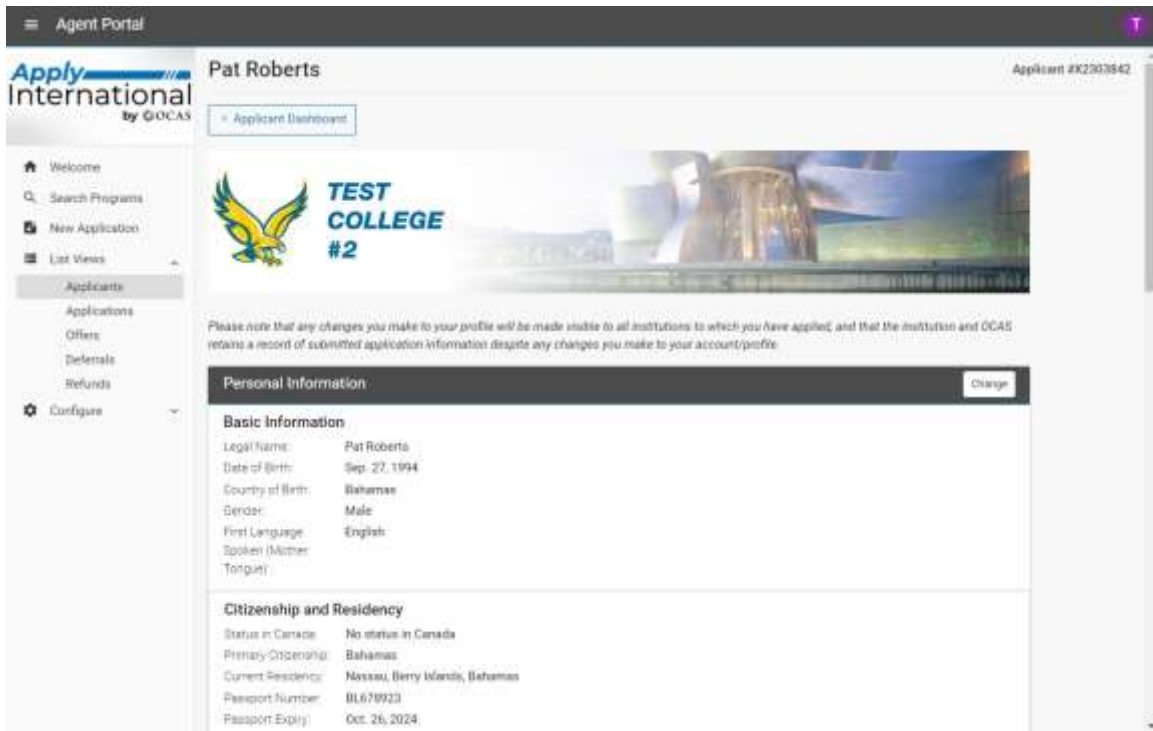


4. On the applicant dashboard, click **View Profile**.



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





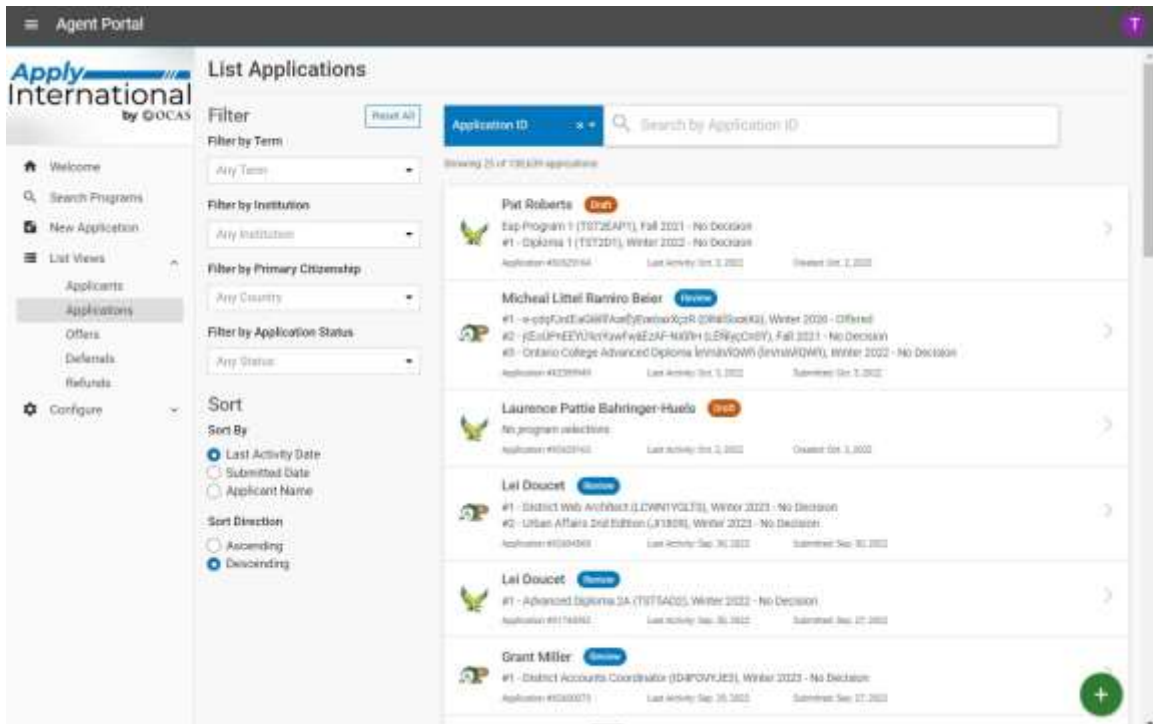
5. Click **Change** at the top right to edit the applicant's information.

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.

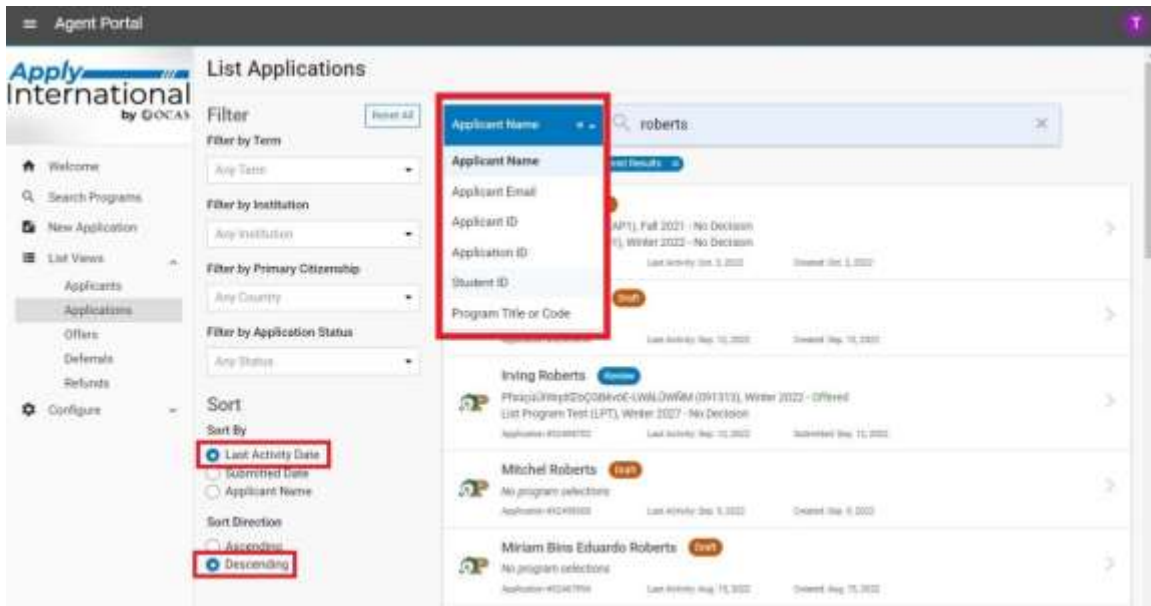




Search, Filter, and Sort the List of Applications

- 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
- 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.

The screenshot shows the 'List Applications' interface. On the left is a navigation menu with options like 'Welcome', 'Search Programs', 'New Application', 'List Views', 'Applications', 'Offers', 'Deferrals', 'Refunds', and 'Configure'. The main area is titled 'List Applications' and includes a 'Filter' section with dropdowns for 'Term', 'Institution', 'Primary Citizenship', and 'Application Status'. There is also a 'Sort' section with options for 'Last Activity Date', 'Submitted Date', and 'Applicant Name', and a 'Sort Direction' section with 'Ascending' and 'Descending' options. The application list shows entries for 'Pat Roberts' with various programs like 'Eap Program 1 (TST2EAP1)', '#1 - Diploma 1 (TST2D1)', and '#1 - District Web Architect (LDWNYG13)'. Each entry has a 'Draft' status and a 'Change' button.

- 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.

The screenshot shows the 'Application for Pat Roberts' in 'Draft' status. The page is titled 'Review' and includes a message: 'Please review the information below for accuracy and completeness. If everything looks correct, you may proceed to payment!'. The application details are organized into sections: 'Selected Programs', 'Agency Details', and 'Personal Information'. Each section has a 'Change' button at the top right. The 'Selected Programs' section lists 'Eap Program 1 (TST2EAP1)' and '#1 - Diploma 1 (TST2D1)'. The 'Agency Details' section shows 'Test Agency 1' with address, city, and website. The 'Personal Information' section shows 'Basic Information' including legal name, date of birth, country of birth, and gender.

- 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

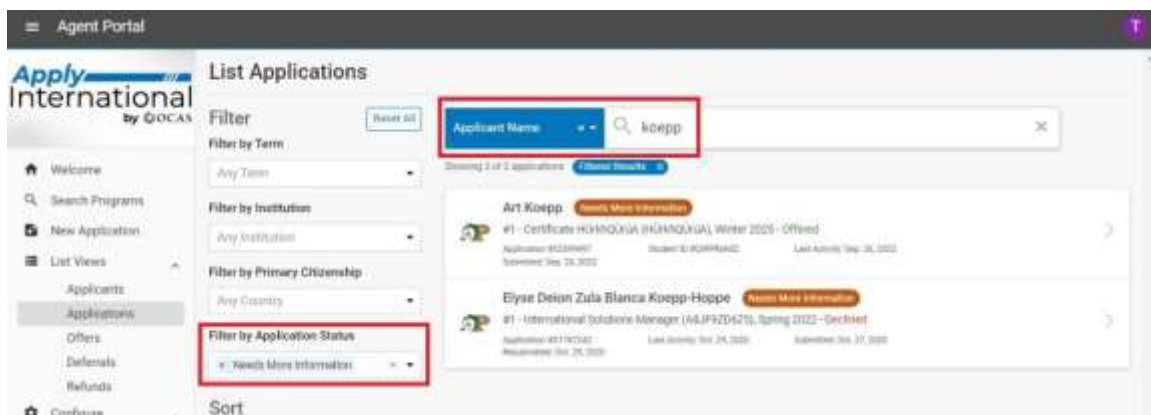
Responding to Applications that “Need More Information”

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.



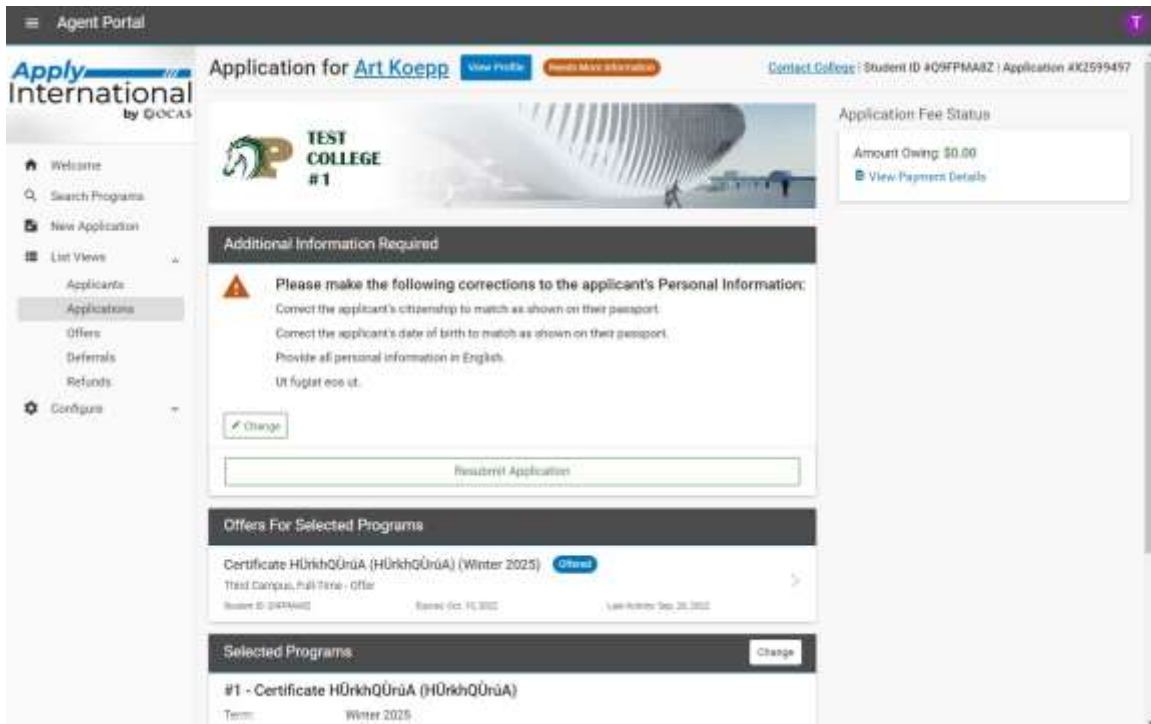
4. Enter the applicant’s name or the application ID into the search bar, in order to find the appropriate applicant. Select this item from the list.

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.

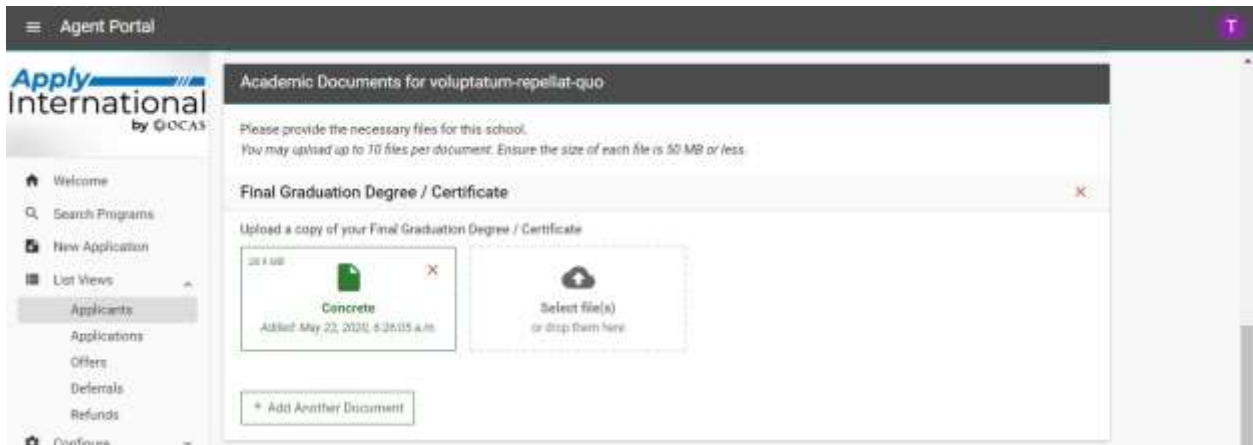
The example below shows corrections for Supporting Documents.



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

Make the Necessary Corrections

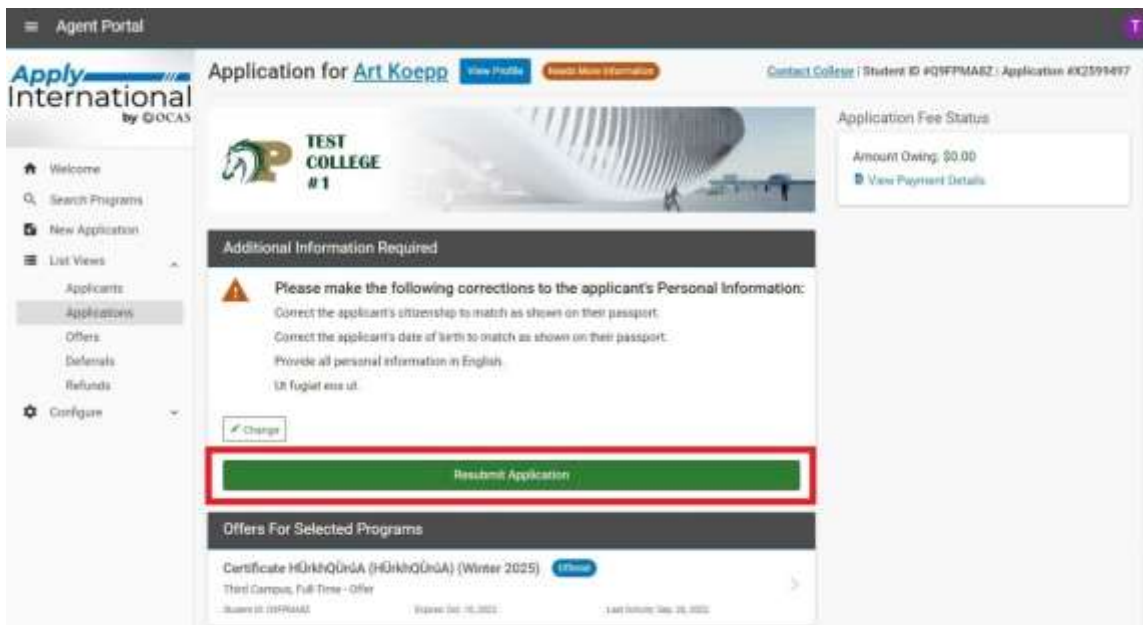
1. The appropriate page in the application will appear; for example, Supporting Documents. Following the instructions provided above, locate the necessary Supporting Document that requires the missing information.



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?

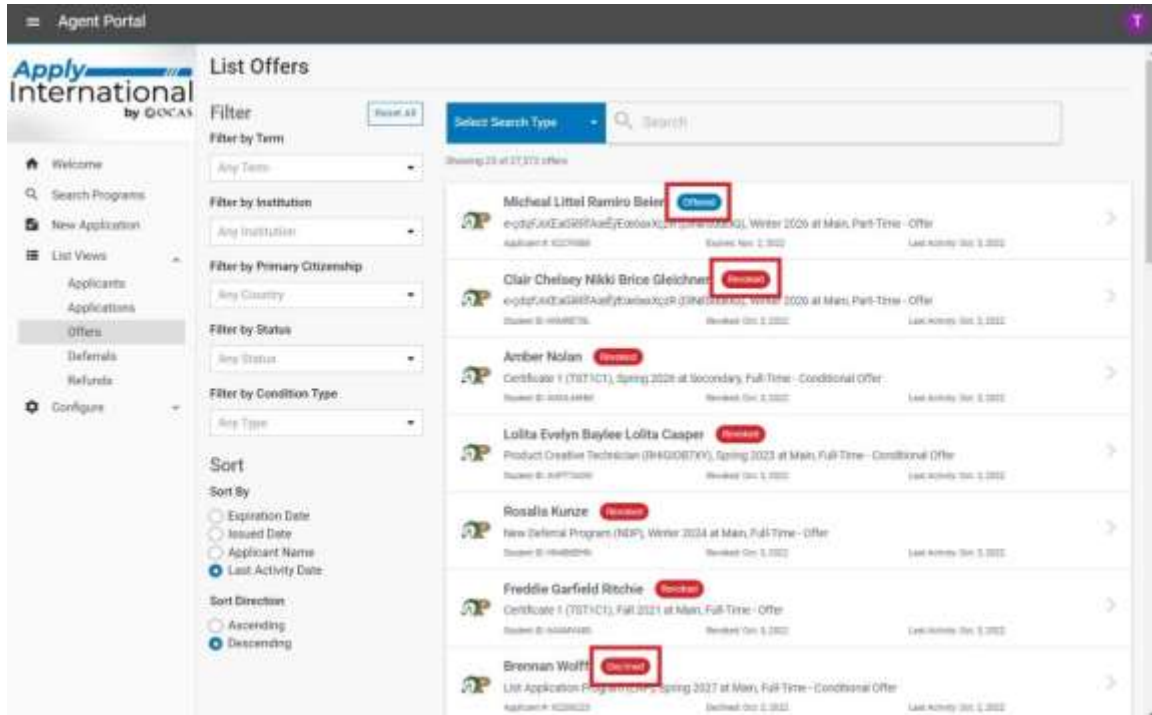
Search, Filter, and Sort the List of Offers

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.



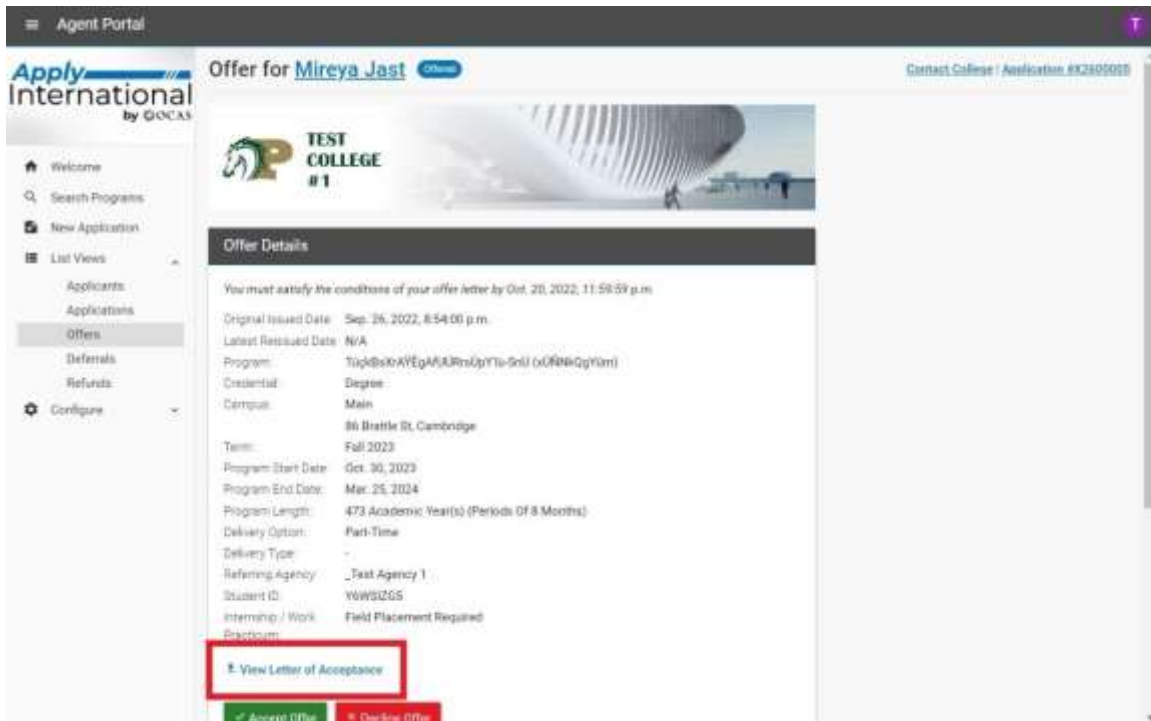
The college may issue an offer on:

- 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 loan) 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



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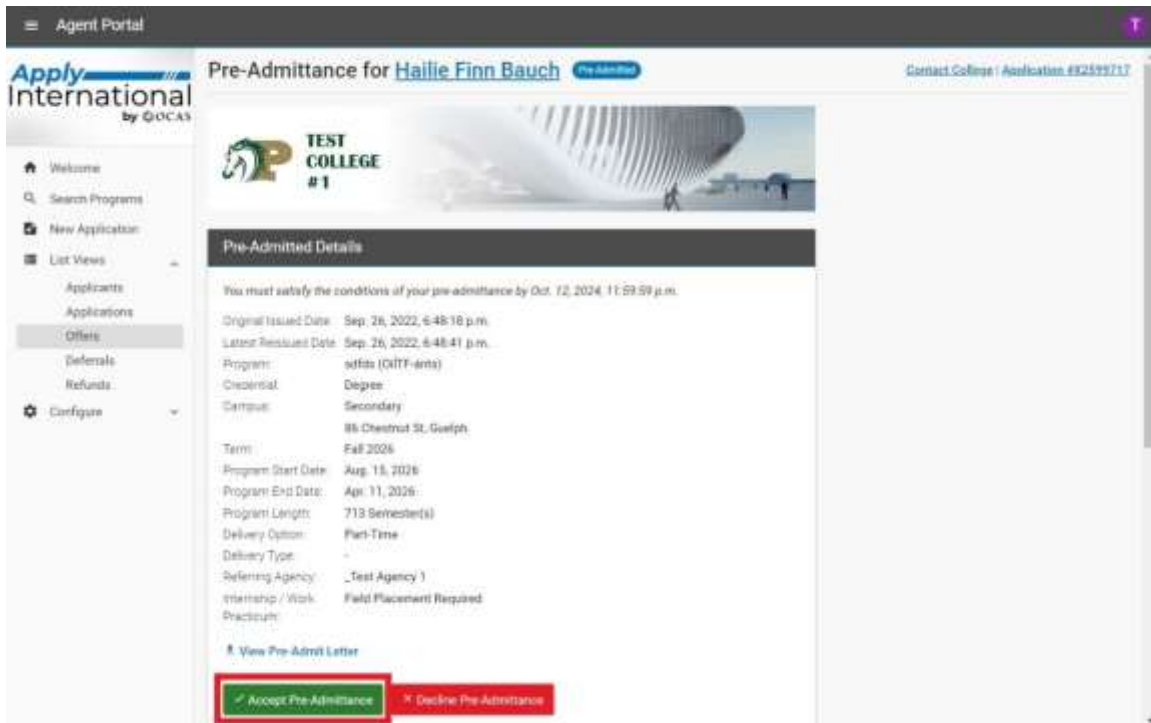
The status will show as “Pre-Admitted” in your Agent Portal.

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.

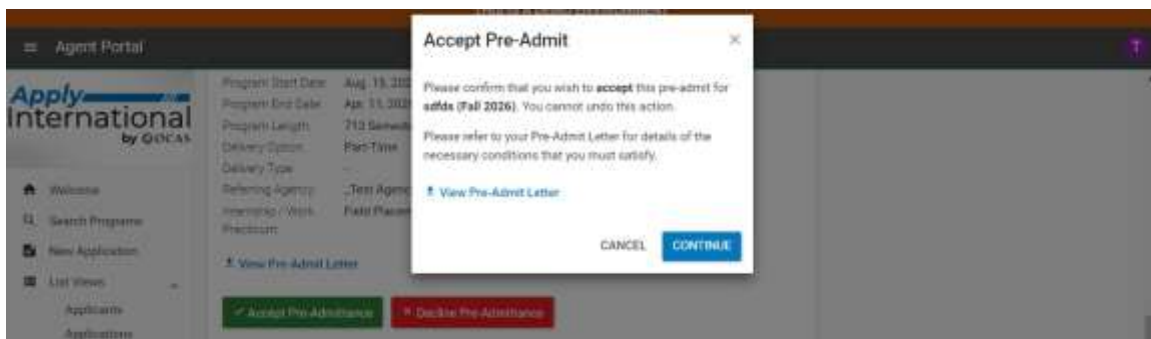
1. On the List Offers page, Filter by Status = **Pre-Admitted**.
2. Select the item from the list that contains the Pre-Admitted state.

The screenshot shows the 'Agent Portal' interface for 'Apply International by OCAS'. The 'List Offers' page is active, displaying a list of offers. The left sidebar contains navigation options: Welcome, Search Programs, New Application, List Views (Applicants, Applications, Offers, Deferrals, Refunds), and Configure. The main content area has a 'Filter' section with dropdowns for 'Filter by Term', 'Filter by Institution', 'Filter by Primary Citizenship', 'Filter by Status' (set to 'Pre-Admitted'), and 'Filter by Condition Type'. Below the filter is a 'Sort' section with 'Sort by' options (Expiration Date, Issued Date, Applicant Name, Last Activity Date) and 'Sort Direction' (Ascending, Descending). The offer list shows several entries, each with a 'Pre-Admitted' tag. The first offer, 'Margarete Weber', has a red box around the 'Pre-Admitted' tag. Other offers include 'Addie Amelle Elyse Deshaun Schroeder', 'Guadalupe Dibbert', 'Halle Finn Bauch', 'Lizeth Aron Herzog', 'Annabel Greenfelder', and 'Amya Rusoffsdottir'.

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



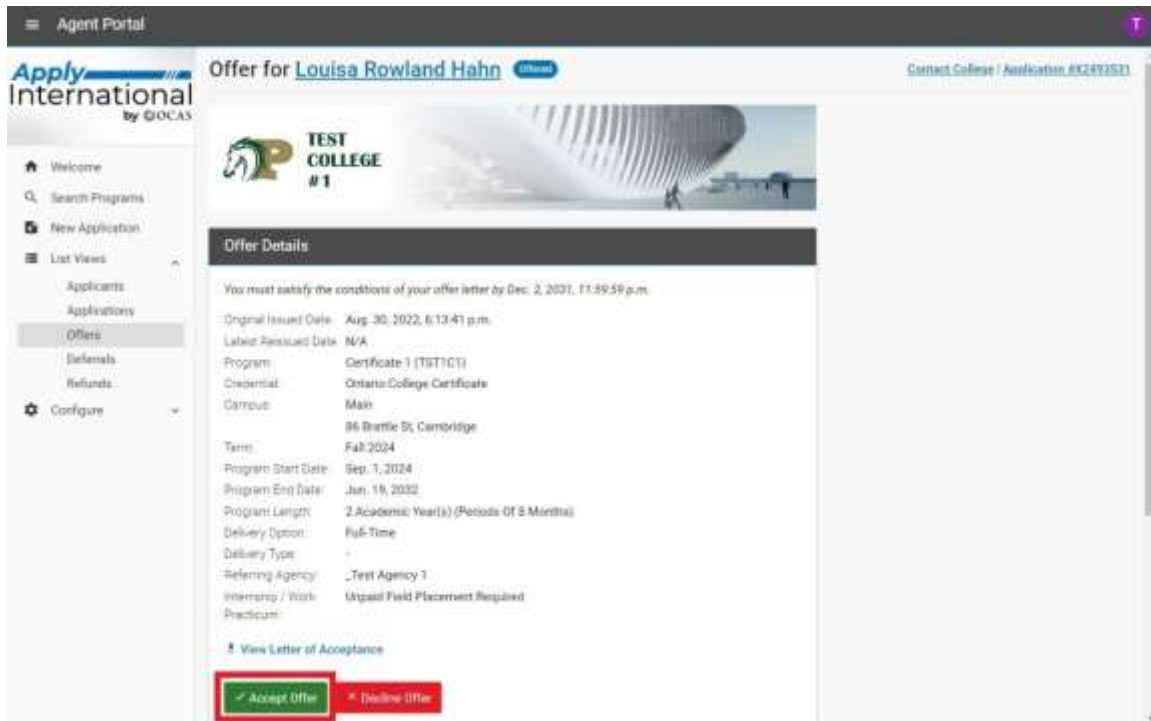
4. A confirmation message will appear. Read the information provided and click **Continue**.



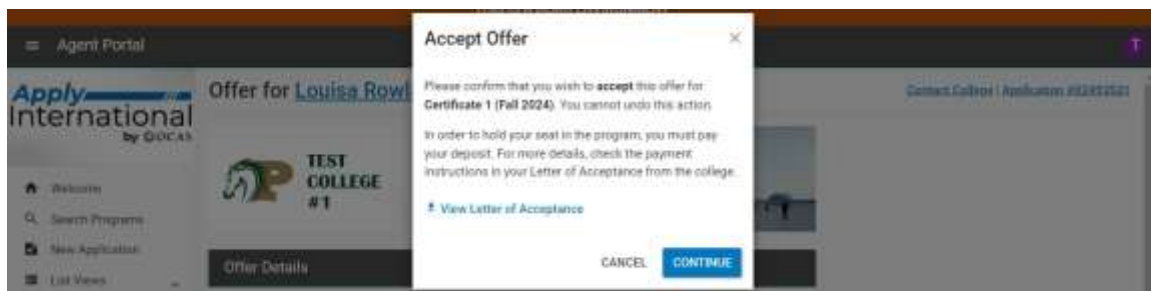
Once the college acknowledges that the necessary conditions of the Pre-Admit have been addressed, the college will issue a standard Offer (with an updated Letter of Acceptance).

Accept an Offer

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



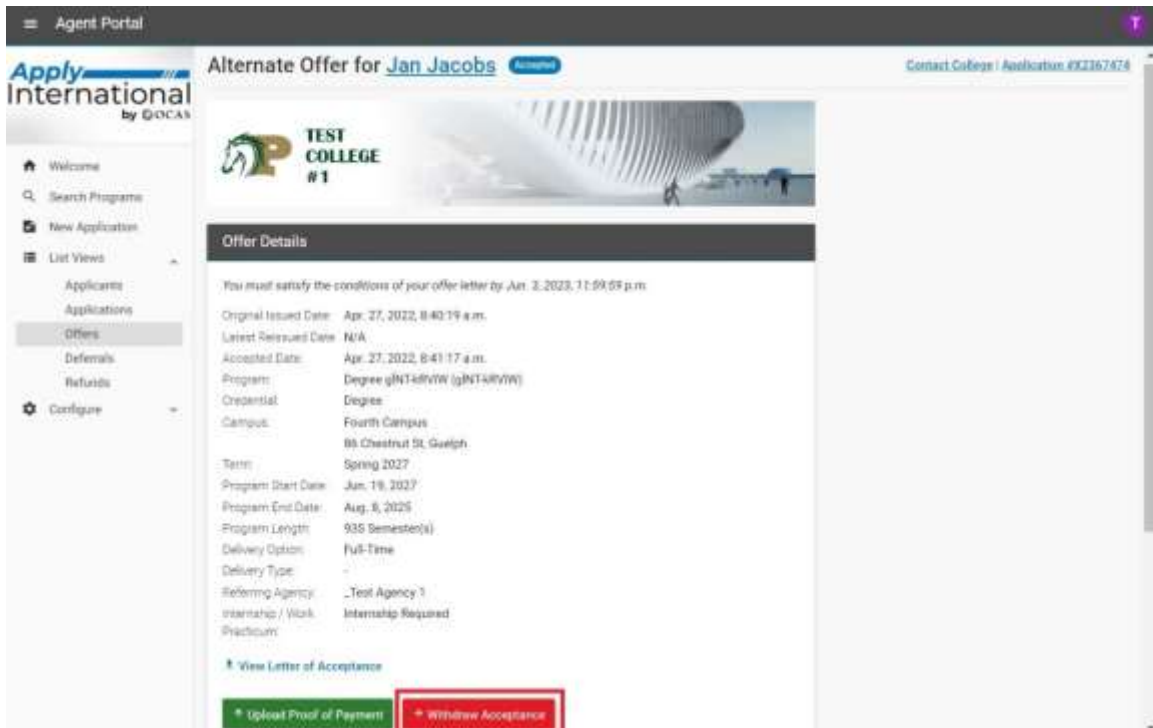
2. A confirmation message will appear. Read the information provided and click **Continue** to confirm acceptance of the offer.



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.

Withdraw Acceptance of Offer X

Please indicate why you are withdrawing acceptance of this offer.

Withdraw Reason

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

Do you want 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.

Decline Offer X

Please confirm that you wish to **decline** this offer for **List Application Program (Spring 2027)**. You cannot undo this action.

Decline Reason

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**.

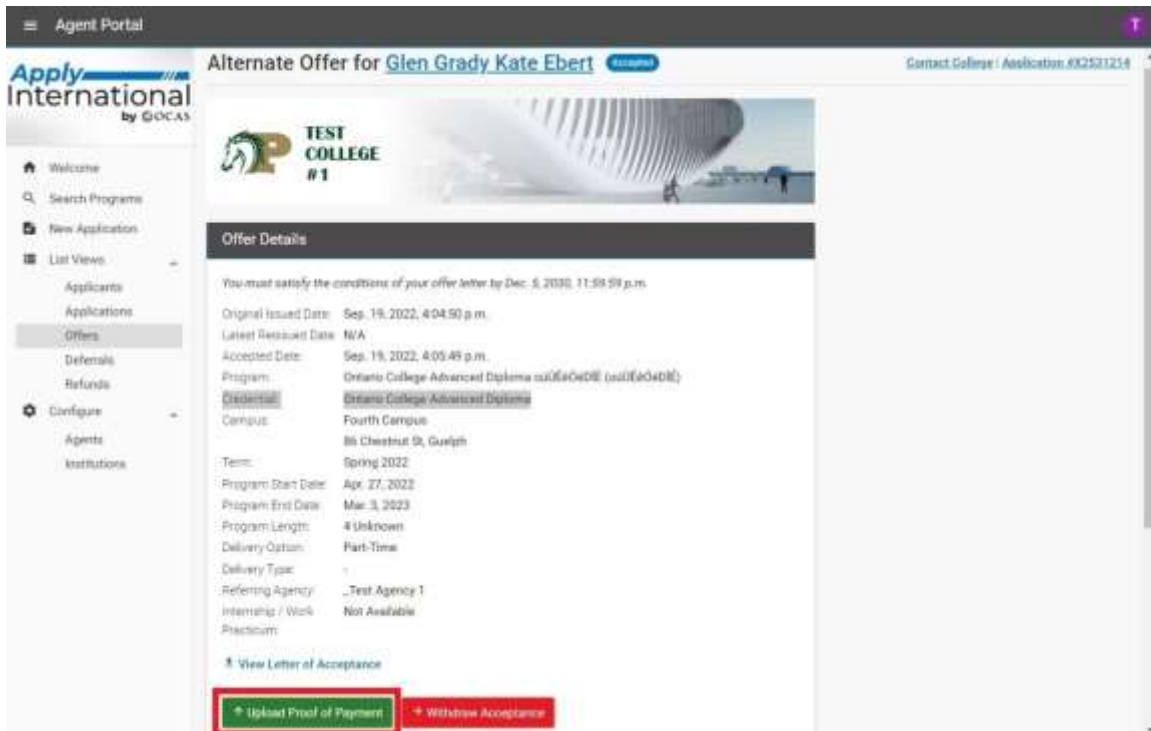
2. In the Refund Request Details section, upload documents to support the request.
3. In the **Additional Requests** text box, provide additional information to support the refund request; then click **Save**.

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

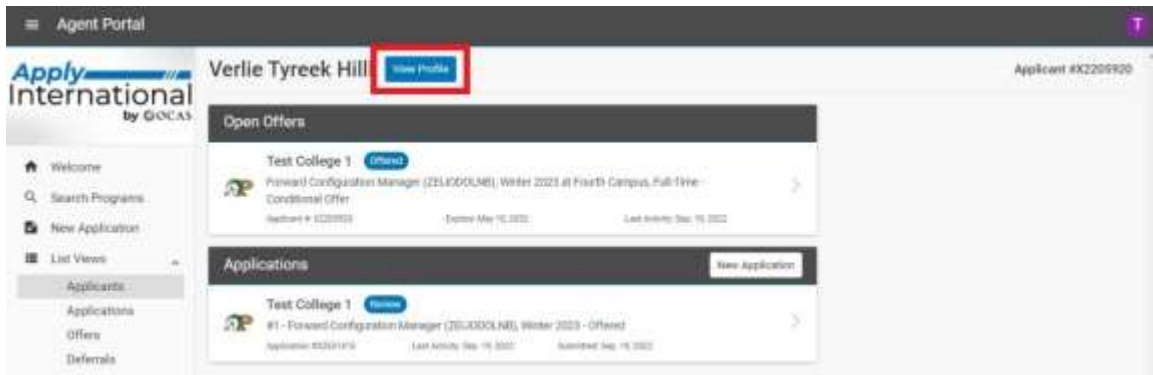
1. From the Dashboard view, click the **Offers** link under List Views on the left.
2. In the Filter by Type dropdown, select **With Conditions** to view all conditional offers and select the offer you wish you view.
3. On the offer details page, note the offer conditions at the bottom.



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



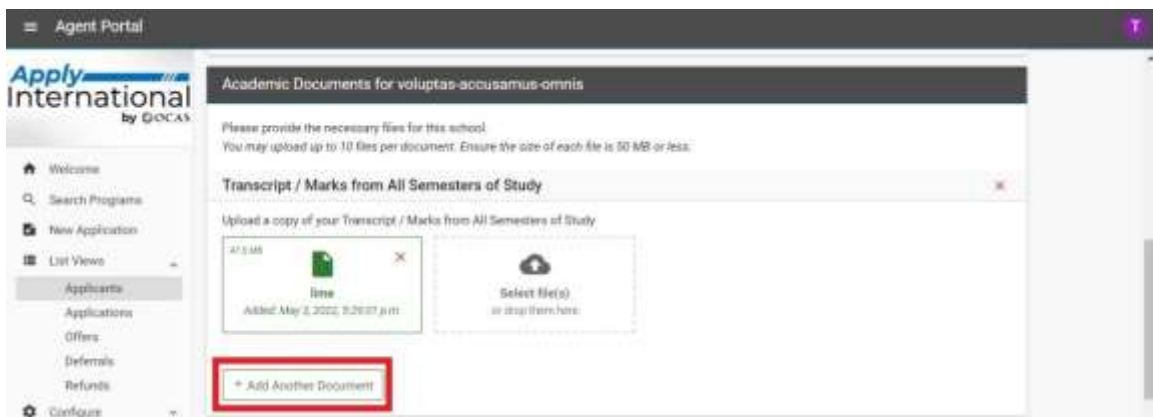
5. On the Applicant dashboard page, click **View Profile**.



6. On the Applicant profile page, scroll down to the bottom and click the **Change** button at the top right of the Supporting 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.

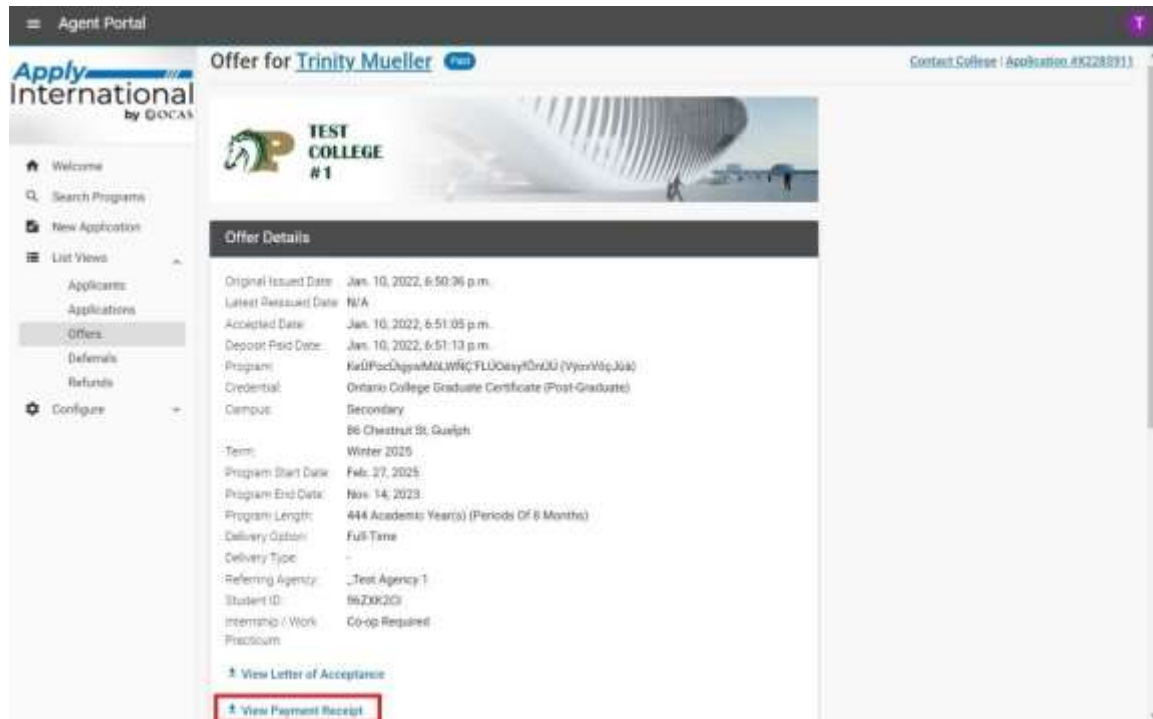
1. From the Dashboard view, click the **Offers** link under List Views on the left.



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**.



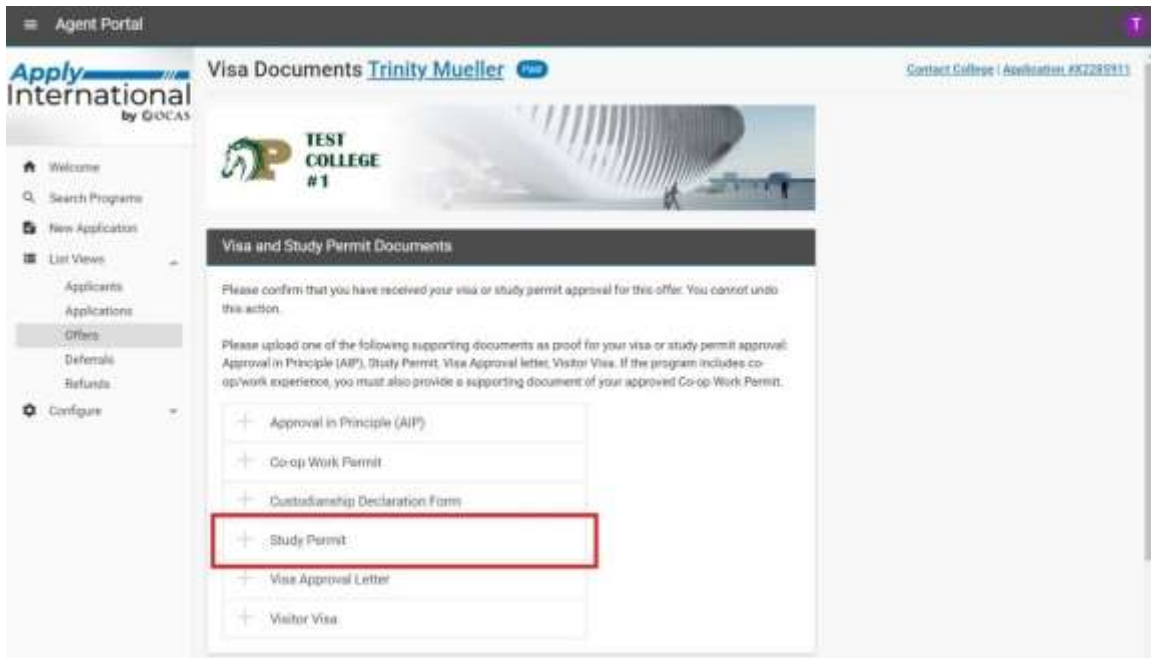
Upload Visa / Study Permit

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)

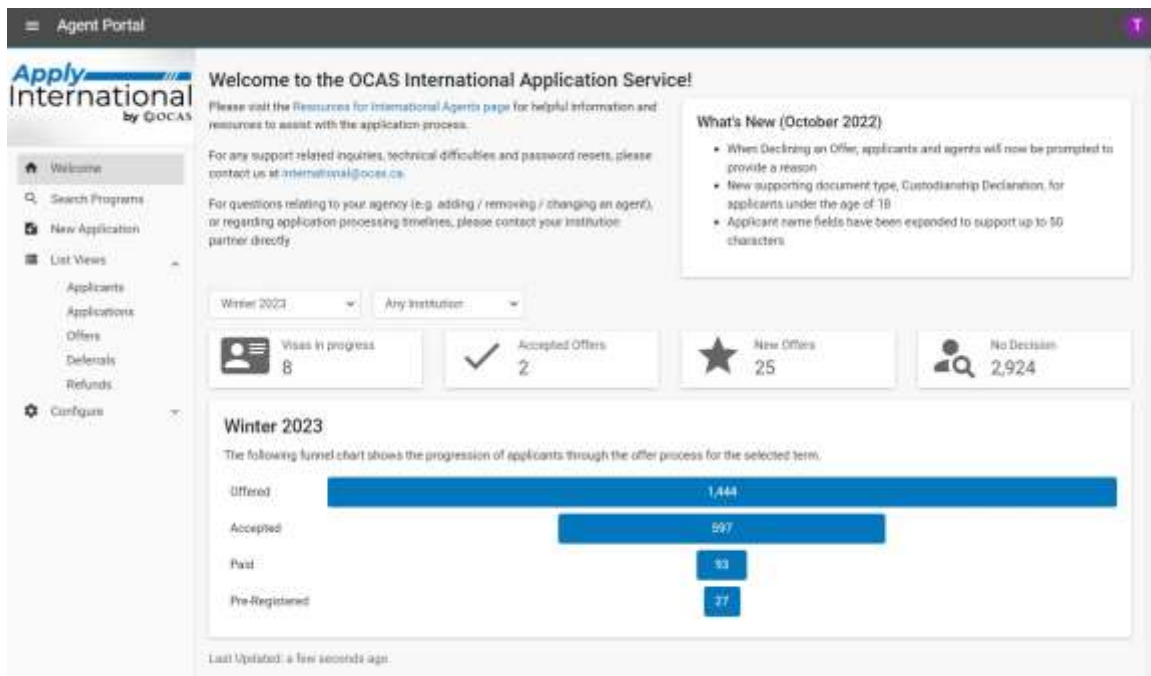
Both you and the applicant will receive an email notifying you if an offer has been revoked. No further actions are available when an offer shows as 'Revoked'.

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

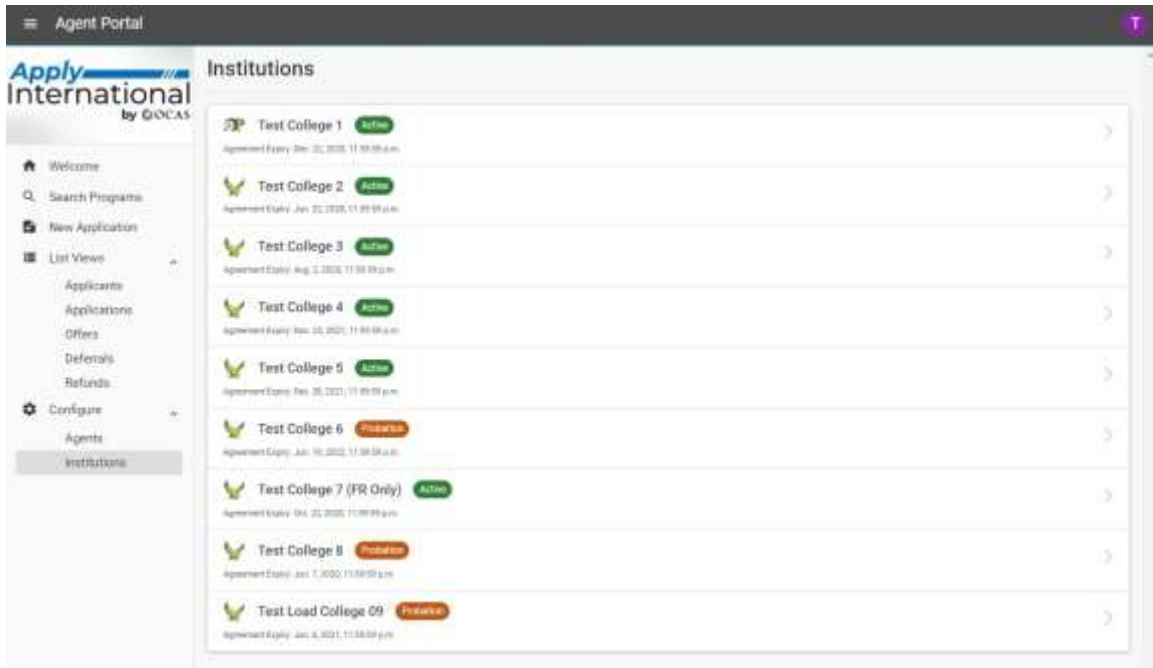
By default, the Dashboard data is filtered for a single term. You can filter the data by term or by institution.



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”.

