



AGENT PORTAL GUIDE

APRIL 8, 2020

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1.0 Activating an Account

Step 1:

Navigate to the Secure Agent Portal page:

This link will be provided by the international student program and is commonly found on their website.

Step 2:

Click the **Agents Start Here** link.

Secure Portal - Presentation



Agents Start Here

For active agents. Create and submit online student applications.

Step 3:

Click the **Reset Password** link. **Only click this link once.**

Step 4:

Enter your email address. **This must be your official agent email address we have on file.** Press the **Reset Password** button. You will see a confirmation message that an email has been sent.

Step 5:

Check your inbox for a message with subject starting with "Password Reset Instructions". If you do not see this message within five minutes, please check your junk/spam folder. **Click the link to complete the password request.** You will get the following message:



Reset Password Request Complete

An email has been sent to alyson@sis.support with your new password.

Return to [Sign In](#).

Step 6:

Return to your email inbox and locate a new message with subject which starts with "Your Reset Password for". **Copy the temporary password to your clipboard.** Click the Sign In link from the message in Step 5.

Step 7:

Login using your **email address** and **temporary password** copied from Step 6.

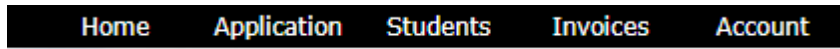
Step 8:

Change your password by entering the "temporary" password from the email in Step 6, and a new password of your choosing. Press **Change Password** button. Click **Continue**.

The screenshot shows a 'Change Password' form with three input fields: 'Temporary Password', 'New password', and 'Retype new password'. A 'Change Password' button is at the bottom. Red callouts provide instructions: '1' points to the Temporary Password field with the text 'Enter the password from the email received in Step 5'; '2' points to the New password field with the text 'Choose a new Password'; and '3' points to the Change Password button.

2.0 Navigation

The top menu bar provides access to various information for the agent.



Home: Displays quick links for applications, student information and invoices.

Application: Create, view and edit applications, and view applications instructions for preparing an application. In **View Applications**, *pay attention to expired applications that indicate they will be auto-deleted! Once deleted, they cannot be retrieved.*


Students: View all students enrolled with the international student program, and view shared documents such as report cards and transcripts.

Invoices: View and print invoices and securely share invoices with parents or students. Many international student programs are now integrated with payment gateways and offer direct payment links for **Western Union** or **Flywire**. See *Student Invoices* section of this guide.

Account: Ability for the agent to view account details, change their password and sign out of the agent portal.

- **Note:** that if an agency is using the same email address for multiple agents, changing the password changes it for all agents.

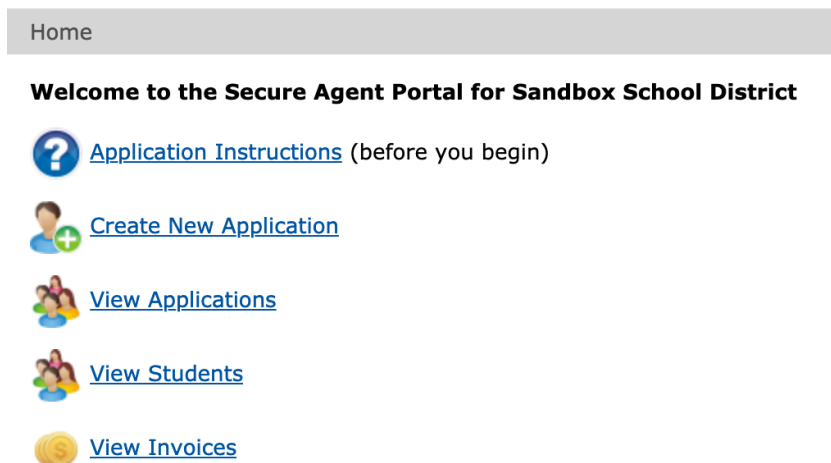
When moving between menus, or returning to a previous screen, use the “breadcrumb” trail, or the

 button, rather than the internet browser back button.



3.0 The Home Page

- **Application Instructions:** Provide guidelines and expectations for applying and outline documentation that must be submitted with the application. It is important to note that these guidelines and expectations can vary by international student.
- **Create New Application:** Begin a new an application for a student.
- **View Applications:** View existing applications in progress or submitted. ***This is an important screen to pay attention to!*** It provides: the status of applications, allows you to resume working on an application, as well as warnings about applications about to be deleted due to non-completion.
- **View Students:** Ability to view all students enrolled with the international student program that are associated with an agency. In additional, documents that have been shared with the agent are accessible (ex. report cards)
- **View Invoices:** Ability to view invoices, generate receipts, initiate secure payment, and securely share invoices with parents.



4.0 Creating an Application

Note: Once an application has been created, agents can share it with parents to help complete it. The **Share URL** is unique, and ensures parents or students only see the shared application. See the *Sharing an Application* section of this guide.

1. On the **Home** page, click on and read **Application Instructions**. When done, return to the Home page by clicking **Home** in the top menu bar.
2. Click on **Create New Application**.
3. Select the application type (if more than one) and enter the students legal last name, legal first name and birthdate.
4. Click **Create Application** to create a student application record.

To create a new application, you must complete the following required fields.

IMPORTANT: Do not enter names in UPPERCASE. Please use correct capitalization:

SAMANTHA TABITHA JOHNSTON
 Samantha Tabitha Johnston

Required Information

Application: * Academic DESCRIPTION OF APPLICATION TYPE
 Legal Last Name: * Randall AS IT APPEARS ON YOUR PASSPORT
 Legal First Name: * Brianna AS IT APPEARS ON YOUR PASSPORT
 Birthdate: * May 5, 2010 CLICK ICON OR TYPE DIRECTLY IN THE FORMAT "APRIL 1, 2001"

5. **Note that applications expire and are auto-deleted after the expiry date! Observe the number of days within which the application must be completed.** Different buttons appear at the bottom of each section.

- **Back:** Takes the agent to *Applications > View Applications*. Once *Create Application* has been clicked in the application process, all in-progress and declined student applications appear here.
- **Save & Go Previous:** Saves the information entered in the current section and returns to a previous section.
- **Update:** Saves updated information in the current section.
- **Save & Go Next:** Saves the information in the current section and moves forward to the next section.

- Sections of the application will be displayed for completion. The number of sections and information requested can vary by international student program.
- Complete the information in each section and use **Save & Go Next** at the bottom of the section to move to the next section. Once this is done, completed section numbers will turn green to show that they are complete.

Application > View Applications > Edit Application

This application must be completed within 10 days. ★

All fields with * are required.

Section	Section	Section	Section	Section	Section	Section	Section	Section	Section	Section	Section
<u>1</u>	<u>2</u>	3	4	5	6	7	8	9	10	11	12

Section 2 of 12 - Student Information

Legal Last Name: AS IT APPEARS ON YOUR PASSPORT

Legal First Name: AS IT APPEARS ON YOUR PASSPORT

Legal Middle Name:

Preferred English Name: IF APPLICABLE

Birthdate: USE THE ICON OR TYPE IN "JUNE 3, 2004" FORMAT

Student Face Photo: * Brianna Randall.jpg MUST BE IN JPG FORMAT AND UNDER 3.00 MB ✖

Gender: *

First Language: WHAT LANGUAGE DO YOU SPEAK AT HOME?

Country: * AS IT APPEARS ON YOUR PASSPORT

Student Email: * MUST BE TRUE EMAIL

- In the final section, a **Save & Submit Completed Application** will appear. When this is clicked, no further changes cannot be made to the application.

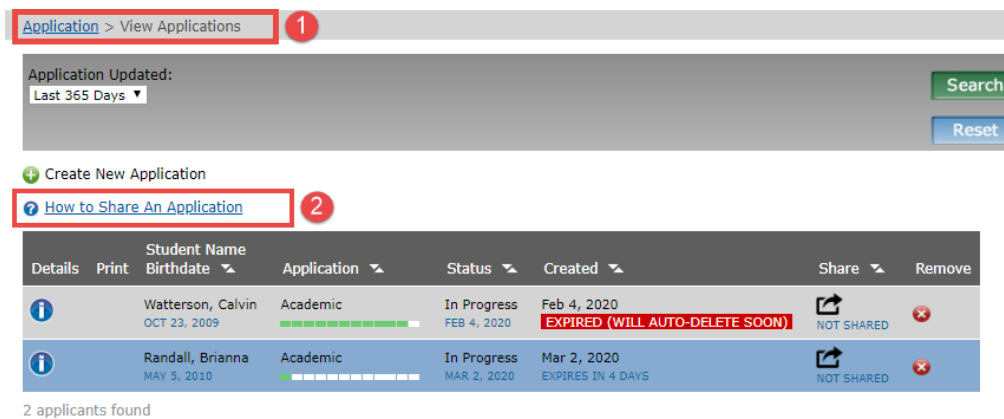
Note: For international student programs using payment gateways (Western Union or Flywire), a secure payment link may appear for online payment of the application fee. Follow payment instructions indicated to submit the application payment.

5.0 Sharing an Application with Parents

This function enables an agent to share the application form so parents can complete information. It is still the responsibility of the agent to submit the application. ***Agents should NEVER share their usernames and passwords with parents or students!***

1. Go to **Application > View Applications**.
2. Click the **How to Share an Application** hyperlink to display instructions.
3. Follow the instructions in the guide to share the application.

Note: Applications can be unshared when the agent does not want the parent to have access anymore.



The screenshot shows the 'Application > View Applications' page. A red box with a '1' highlights the breadcrumb navigation. Below it is a search filter for 'Application Updated: Last 365 Days' with 'Search' and 'Reset' buttons. A '+ Create New Application' link is visible. A second red box with a '2' highlights the 'How to Share An Application' link. Below this is a table of applications:

Details	Print	Student Name Birthdate	Application	Status	Created	Share	Remove
<i>i</i>		Watterson, Calvin OCT 23, 2009	Academic ■■■■■■■■■■■■■■■■■■■■	In Progress FEB 4, 2020	Feb 4, 2020 EXPIRED (WILL AUTO-DELETE SOON)	NOT SHARED	
<i>i</i>		Randall, Brianna MAY 5, 2010	Academic ■■■■■■■■■■■■■■■■■■■■	In Progress MAR 2, 2020	Mar 2, 2020 EXPIRES IN 4 DAYS	NOT SHARED	

2 applicants found

6.0 Viewing Student information

View all students enrolled with the international student program that are associated with the agency. In addition, documents that have been shared with the agent are accessible (ex. report cards)

1. In the **Students** menu option, select **View Students**.
2. Click the details icon of the student to be viewed.

Students > View Students **1**

Show: Current Students ▾ Last Name: First Name: **Search**

Reset

Details	Student Name ▾	Birthdate ▾	TRUE North ID ▾	Number of Shared Files ▾
i 2	Fowl, Artemis	September 1, 2003	5706	1
i	Mouse, Mickey	November 18, 2009	5713	0

2 students found

3. Basic student details are displayed, as well as any documents uploaded and shared with the agent. Click the document hyperlink to view it.
4. Click the **Back** button to return to the list of students.

Student Details

Legal Last Name:

First Last Name:

Birthdate: AGE 16

Docs

Filename ▾	Size ▾	Date Uploaded ▾
3 Report-Card.png	301.3KB	March 2, 2020 8:51AM

Back **4**

7.0 Viewing & Sharing Student Invoices

Student invoices can also be viewed in the agent portal. In cases where the international student program is using a payment gateway **such as Western Union or Flywire**, the agent may also be able to pay the fees online. See the *Using Payment Gateways* section of this guide for instruction.

Viewing Unpaid Invoices

1. In the **Invoices** menu, select **View Invoices**.
2. In the **Invoice Paid** drop-down, select **No**.

Note: Invoices can be printed for **Agent (showing commission)** or **Parent (not showing commission)**. Invoices can also be shared with parents. Follow the *Sharing Invoices* steps in this guide.

Print Invoice	Share Invoice	Print Receipts	Student Name	School Year	Due Date	Status	Fees	Paid	Due	Agent Last Agent First
- Select -	NOT SHARED	- Select -	Barry Diana	IN-3753 2019-2020	Feb 16, 2020	⚠	250.00	0.00	250.00	Oshust Alyson
- Select -	NOT SHARED	- Select -	Fowl Artemis	IN-3749 2019-2020	Feb 14, 2020	⚠	1,000.00	0.00	1,000.00	Oshust Alyson
For Agent	NOT SHARED	- Select -	Mouse Mickey	IN-3751 2019-2020	Feb 16, 2020	⚠	250.00	0.00	250.00	Oshust Alyson

Sharing Invoices

1. In the **Invoices** menu, select **View Invoices**.
2. Click the **How to Share an Invoice** hyperlink to display instructions.
3. Follow the instructions in the guide to share the invoice.

Note: Invoices can be unshared when the agent does not want the parent to have access anymore.

Viewing Paid Invoices

1. In the **Invoices** menu, select **View Invoices**.
2. In the **Invoice Paid** drop-down, select **Yes**.

Invoices > View Invoices 1

Invoice Paid: Yes 2

[How to Share An Invoice](#)

Print Invoice	Share Invoice	Pay Invoice	Print Receipts	Student Last	Student First	Invoice School Year	Due Date	Payment Status	Fees	Paid	Due	Agent Last	Agent First
- Select - - Select - For Agent For Parent	NOT SHARED		- Select - - Select - 3542	Fowl Artemis		IN-3738 2019-2020	Dec 6, 2019		9,200.00	9,200.00	0.00	Oshust Alyson	

Invoices and receipts can be printed here:
 a. Print invoice for agent or parent. Commission will not appear on parent invoice.
 b. Print receipts for paid invoices.

Using Payment Gateways

In cases where an international student program is integrated with a financial payment gateway such as Western Union or Flywire, invoices can be securely paid directly from the portal. ***When an invoice is shared with a parent, even the parent can access the gateway to pay for their student!***

1. In the **Invoices** menu, select **View Invoices**.
2. Click the **Pay Invoice** button to begin the payment process. (Western Union used in example, may also be Flywire)
3. Read the pop-up message that says you will be transferred to the secure payment site. Click **OK** to proceed.

Invoices > View Invoices 1

Invoice Paid: No

[How to Share An Invoice](#)

Print Invoice	Share Invoice	Pay Invoice	Print Receipts	Student Last	Student First	Invoice School Year	Due Date	Payment Status	Fees	Paid	Due	Agent Last	Agent First
- Select -	SHARED	WESTERN UNION SANDBOX MODE 2	- Select -	Barry Diana		IN-3753 2019-2020	Feb 16, 2020		250.00	0.00	250.00	Oshust Alyson	

4. Follow the instructions to complete payment.