



## AGENT PORTAL GUIDE

APRIL 20, 2021

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## 1. 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.



#### Reset Password Request Received

An email has been sent to angelinefowl@email.com with instructions on how to reset your password. Please note this request must be used within 12 hours.

### 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 a request complete message.



#### Reset Password Request Complete

An email has been sent to angelinefowl@email.com : 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:

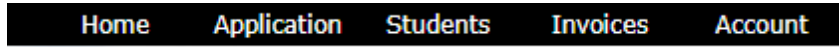
Change your password by entering the "temporary" password from the email in Step 6, and a new password of your choosing. Press **Change Password** button. Click **Continue**.



The screenshot shows a 'Change Password' form with three input fields: 'Temporary Password: \*', 'New password: \*', and 'Retype new password: \*'. Each field has a red circle with a number (1, 2, and 3 respectively) next to it. A red callout bubble points to the first field with the text 'Enter the password from the email received in Step 5'. Another red callout bubble points to the second field with the text 'Choose a new Password'. At the bottom of the form is a 'Change Password' button with a red circle containing the number 3.

## 2. Navigation

The top menu bar provides access to various topics of 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, view shared documents and messages sent through secure portal message functions.

**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. Changing Your Password

Once an account is created, you can change your password, set up notifications to be delivered by email when new information is available in the portal, and access online help information in the **Account** menu.

1. Go to **Account > Account Details**.
2. Click the **Change Password** link.



3. Enter the password you used to log into your account in the **Old Password** field.
4. Enter a new password in the **New password** field. Your new password must meet the *New Password Requirements* shown on the screen.
5. Enter the new password again in the **Retype new password** field.
6. Click the **Change Password** button to save the change.

[Account](#) > [Account Details](#) > Change Password

Change Password

Old Password: \*

**New Password Requirements:**

- minimum of **8 characters** in length
- contain at least one lower case letter (**a-z**)
- contain at least one upper case letter (**A-Z**)
- contain at least one number (**0-9**)
- contain at least one of the following symbols: **!@#&**

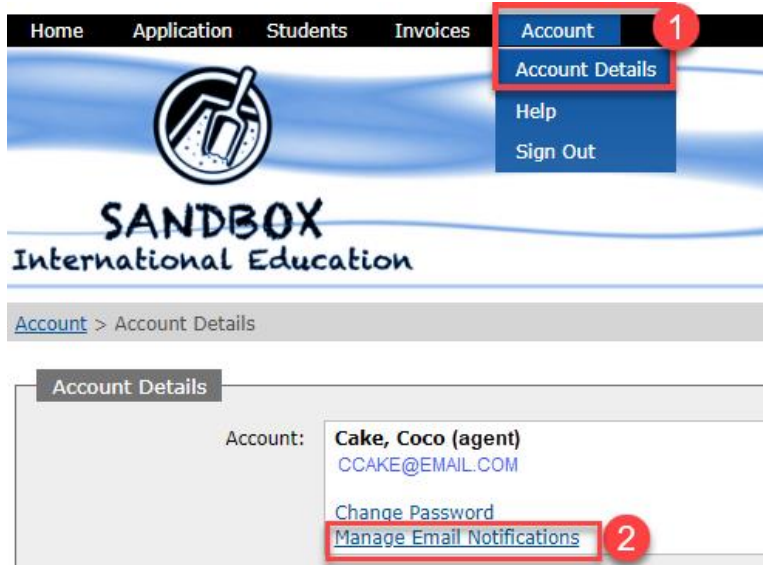
New password: \*

Retype new password: \*

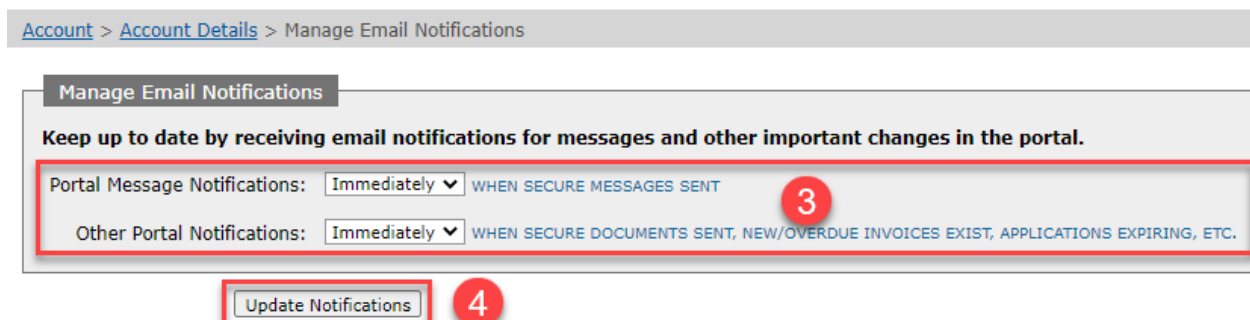
## 4. Set Email Notification Preferences

Agents can set up notifications to ensure communications or information from an international student program are not missed.

1. Go to **Account > Account Details**.
2. Click the **Manage Email Notifications** link.

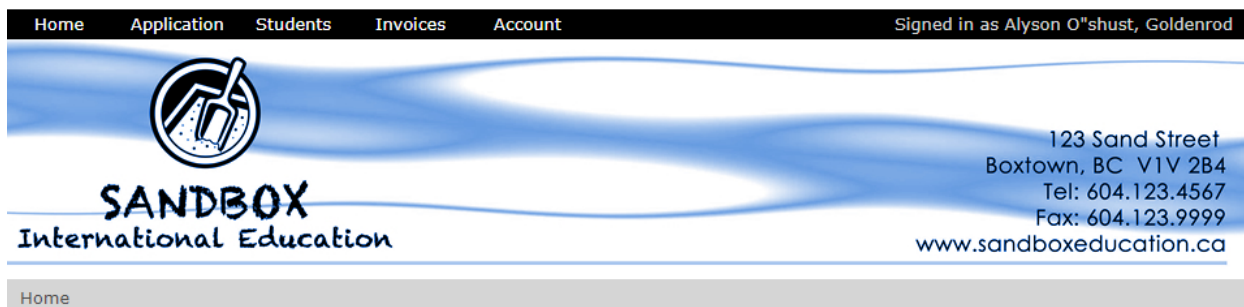


3. Use the dropdown menu in **Portal Message Notifications** and **Other Portal Notifications** to select how often you want to be notified of new communications and information sent to the portal from an international student program.
4. Click **Update Notifications** to save the settings.



## 5. The Home Page

- **Date Sensitive Information:** This area highlights items that require action by the agent or agency. Click the blue links to see the list of records associated with an action item.
- **Quick Links:** Provides one-click access to commonly used menus in the portal.
  - **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 program.
  - **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.
  - **View Documents:** Ability to view documents share to and from the agent portal for students.
  - **View Invoices:** Ability to view invoices, generate receipts, initiate secure payment, and securely share invoices with parents.



### Welcome to the Secure Agent Portal for Sandbox School District

#### Date Sensitive Information

Applications: [1 expired](#) (will be auto-deleted soon)  
 Invoices: [3 new](#), [1 overdue](#) (last 7 days)  
 Secure Messages: [1 sent to alyson@mytruenorth.ca](#), [1 sent to all agent contacts](#) (last 7 days)  
 Shared Documents: [1 document shared](#) (last 7 days)

Date Sensitive Information highlights action items and new information.

#### Quick Links

[Application Instructions](#) (before you begin)  
[Create New Application](#)  
[View Applications](#)  
[View Students](#)  
[View Documents](#)  
[View Invoices](#)

Quick Links provide one-click access to common menu items.

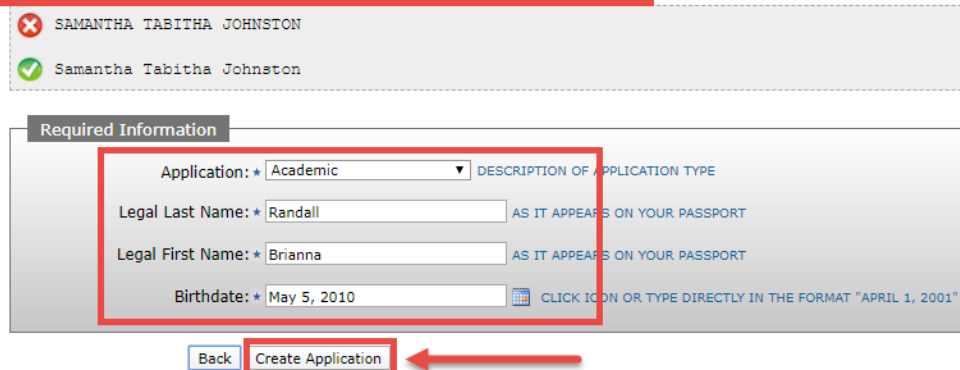
## 6. Creating an Application

**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, click the **Back** button or click **Home** in the top menu bar to return to the Home page.
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.

6. Sections of the application will be displayed for completion. The number of sections and information requested can vary by international student program.
7. 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	Section
<a href="#">1</a>	<a href="#">2</a>	3	4	5	6	7	8	9	10	11	12	

**Section 2 of 12 - Student Information**

Legal Last Name:  [Edit](#) AS IT APPEARS ON YOUR PASSPORT

Legal First Name:  [Edit](#) AS IT APPEARS ON YOUR PASSPORT

Legal Middle Name:

Preferred English Name:  IF APPLICABLE

Birthdate:  [Edit](#) USE THE ICON OR TYPE IN "JUNE 3, 2004" FORMAT

Student Face Photo: \* [Choose File](#) 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

[Back](#) [Save & Go Previous](#) [Update](#) [Save & Go Next](#)

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

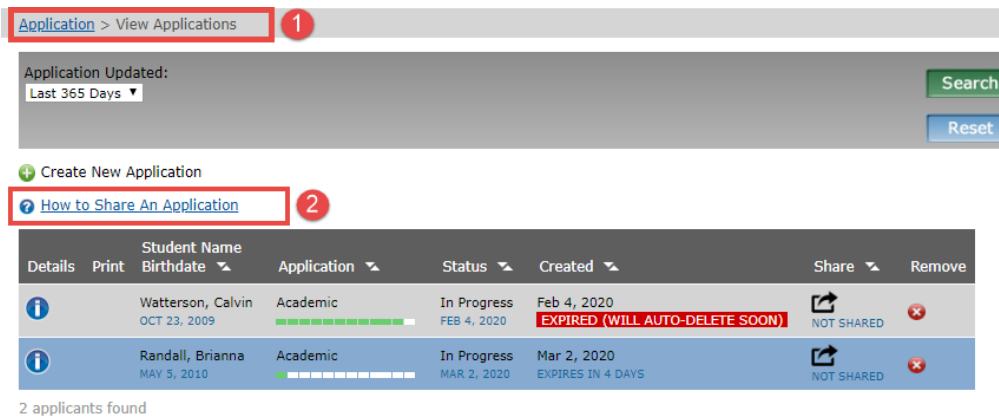
[Back](#) [Save & Go Previous](#) [Update](#) [Save & Submit Completed Application](#)

**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.

## 7. 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!***

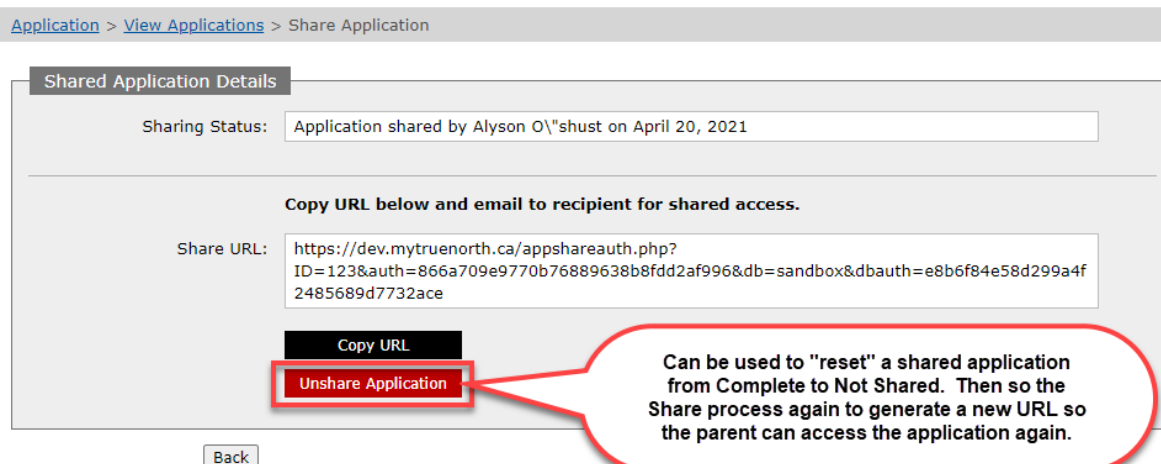
1. Go to **Application > View Applications**.
2. Click the **How to Share an Application** hyperlink to display instructions.
3. Follow the instructions in the guide to share the application.



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

2 applicants found

4. Once a parent has completed an application and submitted it back to the agent, the Share icon will show COMPLETE underneath and the parent can no longer edit the application. If the parent needs access to add or modify information, use the **Unshare Application** button to reset the Share icon. Then use the Share process again so the parent can update the application as required and re-submit to the agent.  
Once a parent has completed the application, the agent must still do the final submission to the international student program.



Application > View Applications > Share Application

**Shared Application Details**

Sharing Status: Application shared by Alyson O\'shust on April 20, 2021

**Copy URL below and email to recipient for shared access.**

Share URL: `https://dev.mytruenorth.ca/appshareauth.php?ID=123&auth=866a709e9770b76889638b8fdd2af996&db=sandbox&dbauth=e8b6f84e58d299a4f2485689d7732ace`

**Copy URL**

**Unshare Application**

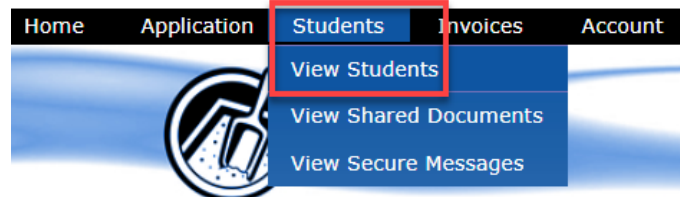
Can be used to "reset" a shared application from Complete to Not Shared. Then so the Share process again to generate a new URL so the parent can access the application again.


[Back](#)

## 8. Students > View Students

View all students enrolled with the international student program that are associated with the agency. In additional, documents that have been shared with the agent are accessible (ex. letters of acceptance, etc.)

1. In the **Students** menu option, select **View Students**.



2. Click the details icon of the student to be viewed.
3. Basic demographics will be displayed, along with:
  - a. **Docs** tab: Displays documents shared between the agent and the international student program. Click the document link to view the document.
  - b. **Messages** tab: Displays secure messages sent to the agent from the international student program. Click the Message Details  icon to view the message.

4. Click the **Back** button to return to the list of students.



**Students > View Students > Student Details**

**Student Details**

Legal Last Name:  Common Last Name:   
 Legal First Name:  Common First Name:   
 Gender:  Birthdate:  AGE 16  
 Country:  

**a** **b**

**Docs** **Messages**

Edit	Filename	Size	Date Shared	Remove
	 <a href="#">Report Card.jpg</a>	110.9KB	April 20, 2021 4:56PM	

 Add Shared Document

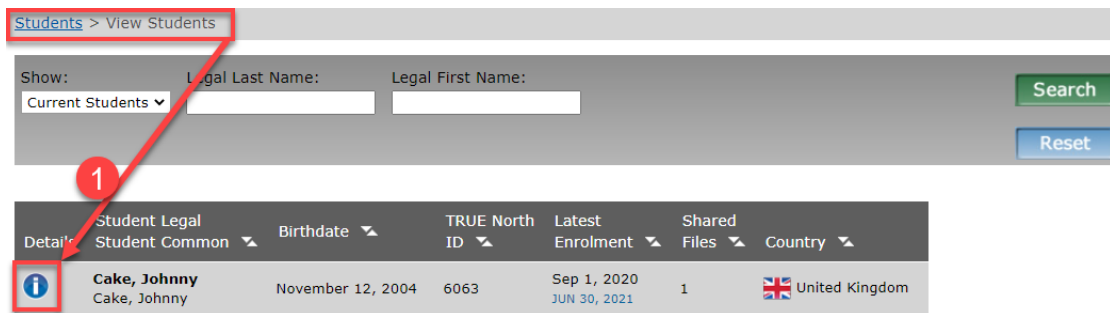
**Back**

**Note:** See the *Sharing a Document* and *Students > View Secure Messages* sections of this guide for additional information.

## 9. Sharing a Document

Agents can now submit documents to an international student program through the agent portal after an application has been approved.

1. In the **Students > View Students** menu, click the **Details** icon for the student that needs a document added.



Students > View Students

Show:  Legal Last Name:  Legal First Name:  Search Reset

Details	Student Legal Student Common	Birthdate	TRUE North ID	Latest Enrolment	Shared Files	Country
<b>i</b>	<b>Cake, Johnny</b> Cake, Johnny	November 12, 2004	6063	Sep 1, 2020 JUN 30, 2021	1	United Kingdom

2. In the **Docs** tab for the student, click the Add Shared Document icon.



Students > View Students > Student Details

Student Details

Legal Last Name:  Common Last Name:   
 Legal First Name:  Common First Name:   
 Gender:  Birthdate:  AGE 16  
 Country:

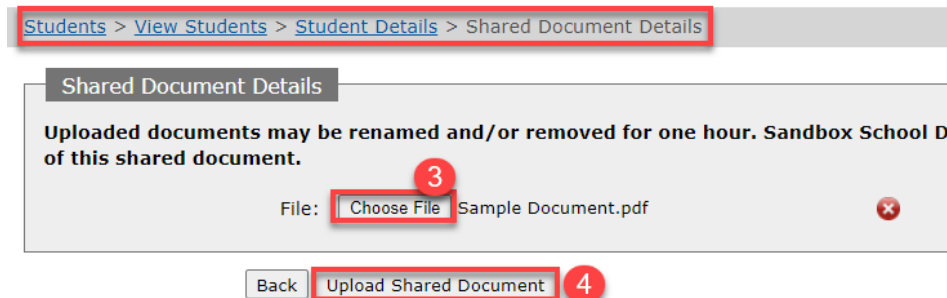
**Docs** Messages

Edit  name  Size  Date Shared  Remove

+ Add Shared Document

Back

3. Use the **Choose File** button to select the document from your computer.
4. Click **Upload Document** to complete the submission. The document will appear on the student record. After 60 minutes, the file can not be replaced or removed. The international student program will receive a notification that a new document has been submitted.



Students > View Students > Student Details > Shared Document Details

Shared Document Details

Uploaded documents may be renamed and/or removed for one hour. Sandbox School D of this shared document.

File:  Choose File  Sample Document.pdf ✕

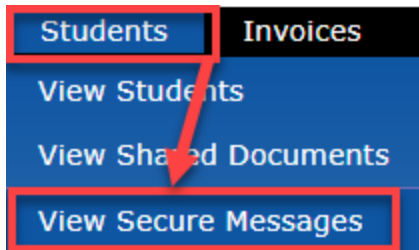
Back Upload Shared Document

## 10. Students > View Secure Messages

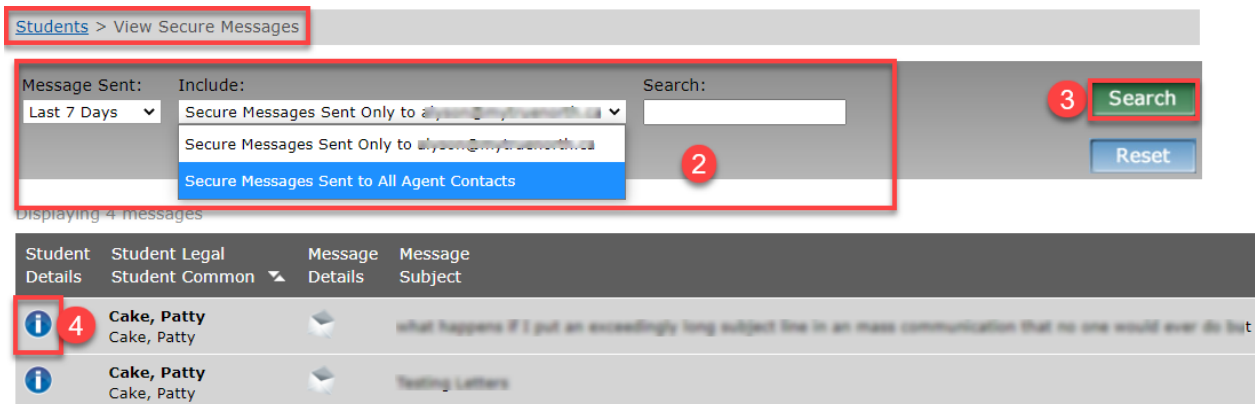
This new function allows agents to go to one spot in the portal to view all secure messages received from an international student program.

Messages received in the last 7 days can be viewed by clicking the *Secure Messages* link on the portal Home page. Messages older than 7 days can be viewed in *Students > View Secure Messages*.

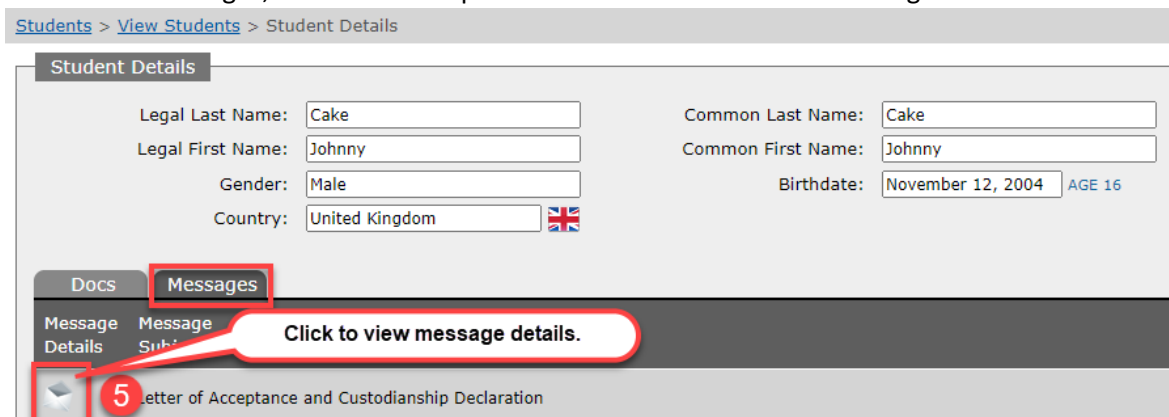
1. In the **Students** menu, select **View Secure Messages**.



2. Use the filters at the top to define a period of time, and the type of messages to be viewed.
3. Click **Search** to find messages that match the filters selected.
4. Click the **Details** icon beside a student name will show a list of messages for that student.



5. In the list of messages, click the Envelope icon to view the details of a message.



In the details of a message, *View Printable Version* can be clicked to generate a printed copy of the message.

If an attachment is included, click the link to open the attachment.

[Students](#) > [View Students](#) > [Student Details](#) > Message Details

**Message Details**


Recipient: Alyson O'shust

From: Alyson Oshust

Date Sent: Apr 20, 2021 5:00 PM

Subject: Letter of Acceptance and Custodianship Declaration

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123 Sand Street  
Boxtown, BC V1V 2B4  
Tel: 604.123.4567  
Fax: 604.123.9999  
[www.sandboxeducation.ca](http://www.sandboxeducation.ca)



PROTECTED - B

April 20, 2021

Johnny Cake and Coco Cake  
123 This St  
Unit 12  
My Town, BC V2N 0A7  
Canada

RE: Cal Kingdom - Letter of Acceptance

Dear Parent(s)/Guardian(s):

 [View Printable Version](#)  [Printing Tips](#)

Attachments:

[Custodian Declaration - Official](#)

**Click to generated a printed version.**

**Click to open attachment, if there is one.**

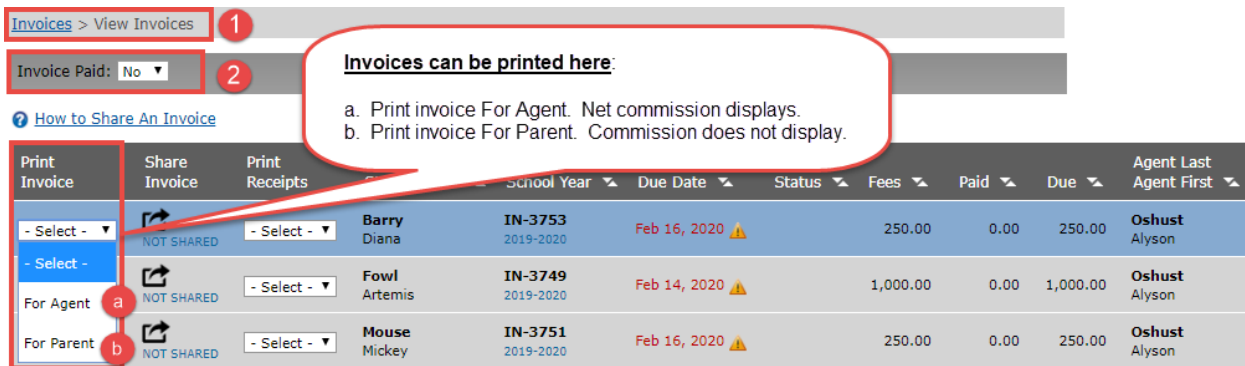
## 11. Viewing & Sharing Student Invoices

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**.

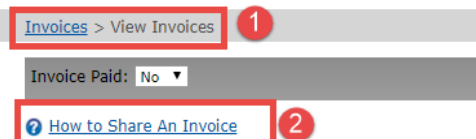
**Note:** Invoices can be printed for Agent (showing commission) or Parent (not showing commission). Invoices can also be shared with parents. Follow the *Sharing Invoices* steps in this guide.



Print Invoice	Share Invoice	Print Receipts	Student Name	Invoice ID	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
- Select -	NOT SHARED	- Select -	Mouse Mickey	IN-3751	2019-2020	Feb 16, 2020	⚠	250.00	0.00	250.00	Oshust	Alyson

### Sharing Invoices

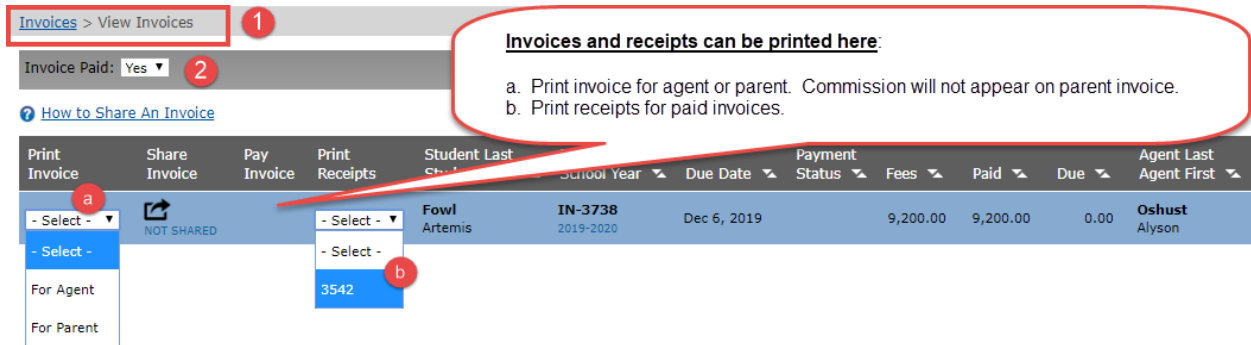
1. In the **Invoices** menu, select **View Invoices**.
2. Click the **How to Share an Invoice** hyperlink to display instructions.
3. Follow the instructions in the guide to share the invoice.



**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 and receipts can be printed here:**

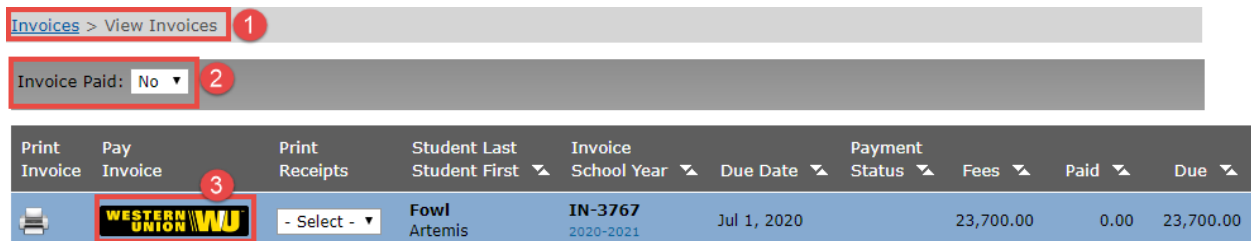
- a. Print invoice for agent or parent. Commission will not appear on parent invoice.
- b. Print receipts for paid invoices.

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
<a href="#">Print Invoice</a>	<a href="#">Share Invoice</a>	<a href="#">Pay Invoice</a>	<a href="#">Print Receipts</a>	Fowl	Artemis	IN-3738 2019-2020	Dec 6, 2019	Paid	9,200.00	9,200.00	0.00	Oshust	Alyson

## 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. Set the **Invoice Paid** dropdown to **No**.
3. Click the **Pay Invoice** button to begin the payment process. (Western Union used in example, may also be Flywire).



Print Invoice	Pay Invoice	Print Receipts	Student Last	Student First	Invoice School Year	Due Date	Payment Status	Fees	Paid	Due
<a href="#">Print Invoice</a>	<a href="#">Pay Invoice</a>	<a href="#">Print Receipts</a>	Fowl	Artemis	IN-3767 2020-2021	Jul 1, 2020		23,700.00	0.00	23,700.00

4. Read the pop-up message that says you will be transferred to the secure payment site. Click **OK** to proceed.
5. Follow the instructions to complete payment.

**IMPORTANT NOTE:** If choosing a bank transfer option, you must print the instructions at the end of the process and *visit your bank to complete the actual money transfer.*