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- Applicant records
- Working with applicant records
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- Managing applications
- Respond to Offers
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- Resources

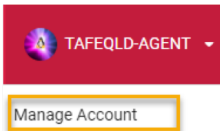
ACCESSING THE PORTAL

Logging in

- Open your web browser and navigate to <https://partner.studylink.com/>
- Once the login page loads, enter your username and password and click 'Login'

Reset password

- Once logged in, select your username in the top-right corner of the screen
- Select the 'Manage Account' option
- Select the 'Change Password' button
- Enter the required fields and save



APPLICANT RECORDS

Create a new applicant

- Select the 'Applicants' menu item, then select '+Add new applicant'
- Enter the Personal and Contact details in the 'Applicant details' form and select 'Save'

Search for an applicant

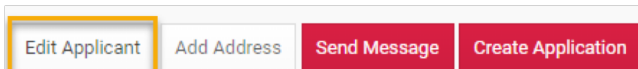
- Select the 'Applicants' menu item
- Type the first name and/or last name into the 'Search' bar and press enter

View an applicant record

- Select the 'View' button to the right of the applicant details to open the record

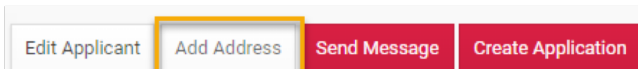
Update applicant details

- With the applicant record open, select the 'Edit Applicant' button



Add applicant address

- With the applicant record open, select the 'Add Address' button



WORKING WITH APPLICANT RECORDS

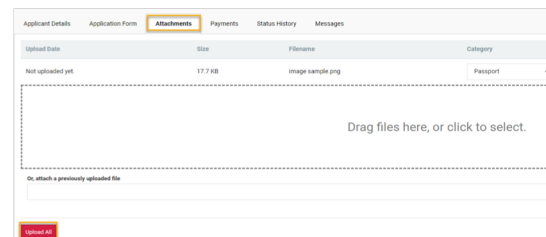
Send the applicant a message

- With the applicant record open, select the 'Send Message' button



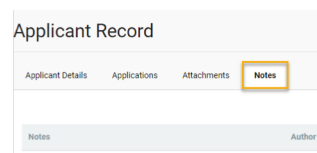
Add documents to an applicant record

- With the applicant record open, select the 'Attachments' tab
- Drag and drop files to the drop area, or click to select files from a specific location
- Select a category for the file e.g. Passport, Academic Transcript
- Select the 'Upload All' button



Add a note to the applicant record

- With the applicant record open, select the 'Notes' tab
- Select the 'Add Note' button, type the note content then 'Save'



Export applicant details

- Select the 'Applicants' menu item
- Select the checkbox next to each applicant whose details you wish to export
- Select the 'Export' button – details will be generated in .CSV format



APPLICATION RECORDS

Create a new application

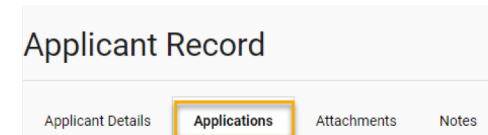
- With the applicant record open, select the 'Create Application' button



- Click inside the 'Filter' area
- Select the filters in order to display the course the applicant is applying for
- Select the course from the available list using the '+Apply' button

Complete the application form

- Select the 'Applications' tab and complete the application details



- Once all mandatory fields are completed, select the 'Next' button
- Upload any required documents in the 'Required documentation' screen

Submit the application form

- The Submit Application screen is presented when all mandatory fields are completed AND required documents are uploaded
- Select the 'Submit Application' button

Submit application

Search for an application

- Select the 'Applications' menu item
- Type the first name and/or last name into the 'Search' bar and press enter

Export application details

- Select the 'Applications' menu item
- Select the checkbox next to each application whose details you wish to export
- Select the 'Export' button – details will be generated in .CSV format



MANAGING APPLICATIONS

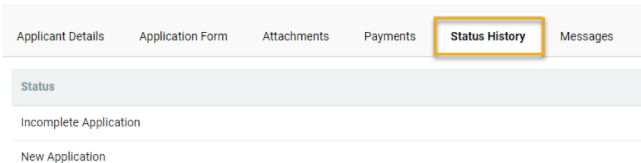
View applications by Status

- Select the 'Dashboard' button at the top of your screen



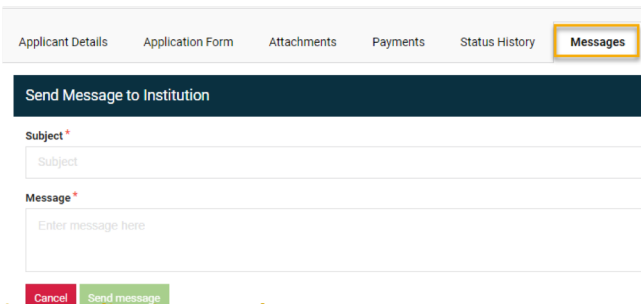
View status history

- Select the 'Applications' menu item
- Select the 'View' button to the right of the application
- Select the 'Status History' tab



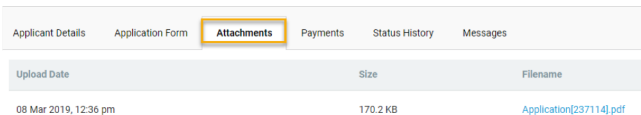
Send a message to the institution

- Locate the application
- Select the 'Messages' tab – the message form opens
- Enter the Subject and Message and select the 'Send Message' button



View application attachments

- Locate the application
- Select the 'Attachments' tab
- Attachments listed are Application PDF, Offer Letters and attachments received through email communications



MANAGING APPLICATIONS Cont

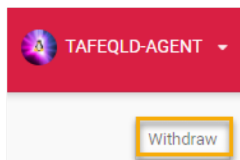
Attempt to re-apply for the same course

- Locate the applicant record from the 'Applicants' menu option
- Select the 'View' button
- Select the 'Create Application' button
- If you select a course for which there is already an application a validation message will display informing you that the applicant has already applied

The applicant Betty Boop has already applied for the course Certificate III in Aged Care

Withdraw an application

- Locate the application record from the 'Applications' menu item
- Select the 'Withdraw' button from the top-right corner of the screen
- Note that Withdraw can only be actioned when applications are in certain statuses. This is configurable by the institution



INBOX AND RESOURCES

View an email from an institution

- Login to the Agent Portal
- Select the 'Inbox' menu option
- Select an email from the displayed list

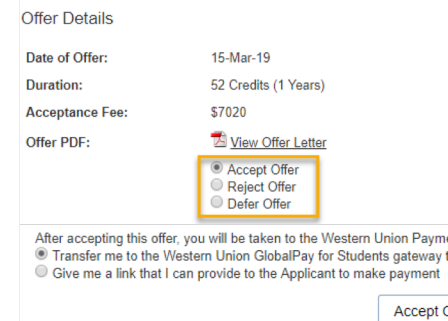
View the list of resources for an institution

- Login to the Agent Portal
- Select the 'Resources' menu option
- Select the Institution
- Select a Resource from the available list

RESPOND TO OFFERS SENT BY AN INSTITUTION

Accept an offer

- Locate the conditional offer from the 'Dashboard' menu option
- Select the 'View' button
- Select the 'Respond to Offer' button – you are presented with 3 options
- Select 'Accept Offer'
- You will be given the option to be directed to the WIP gateway to make payment or to be given a link to provide to the applicant for payment
- Select the 'Accept Offer' button



Reject an offer

- Locate the conditional offer and 'View' as per the previous step
- Select 'Reject Offer' from the available options
- Enter any Comments and select the 'Reject Offer' button

Defer an offer

- Locate the conditional offer and 'View' as per the previous step
- Select 'Defer Offer' from the available options
- Select the intended Intake from the drop down and select the 'Defer Offer' button

