StudyLink Connect

Partner Portal User Guide

CONTENTS

Partner Portal User Guide

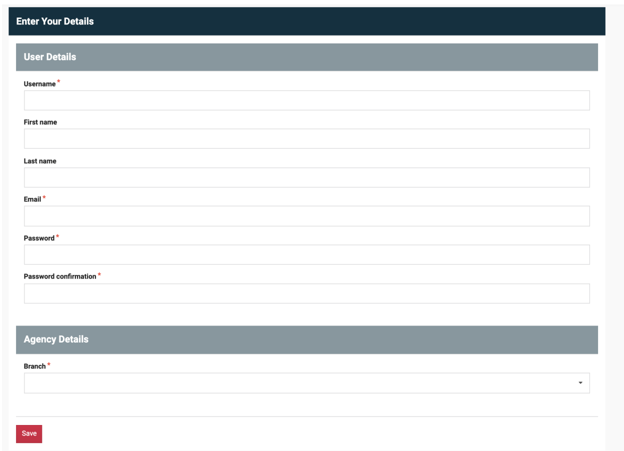
- Create a new Counsellor account
- Manage Counsellor details
- Change a Counsellor's role
- Disable a Counsellor's account

Accessing the Portal

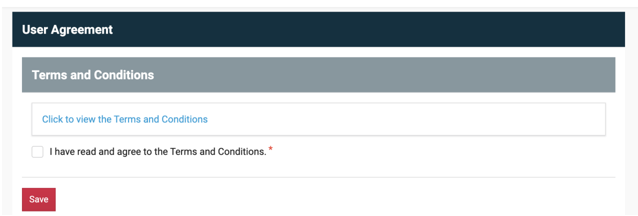
Setting up your account:

1. Go to: https://partner.studylink.com/accounts/reset-password

2. Enter your email address and check your inbox for an activation link
3. Follow the instructions to set up your account (it's important you choose a new username and password and enter a unique email address)



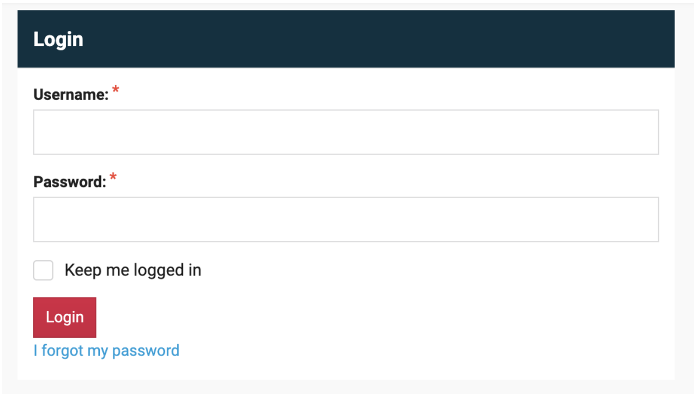
4. Select **'Branch'** to proceed
5. Upon saving your new user record, the **'User Agreement'** screen is displayed. Select the checkbox 'I have read and agree to the Terms and Conditions' and **'Save'**.



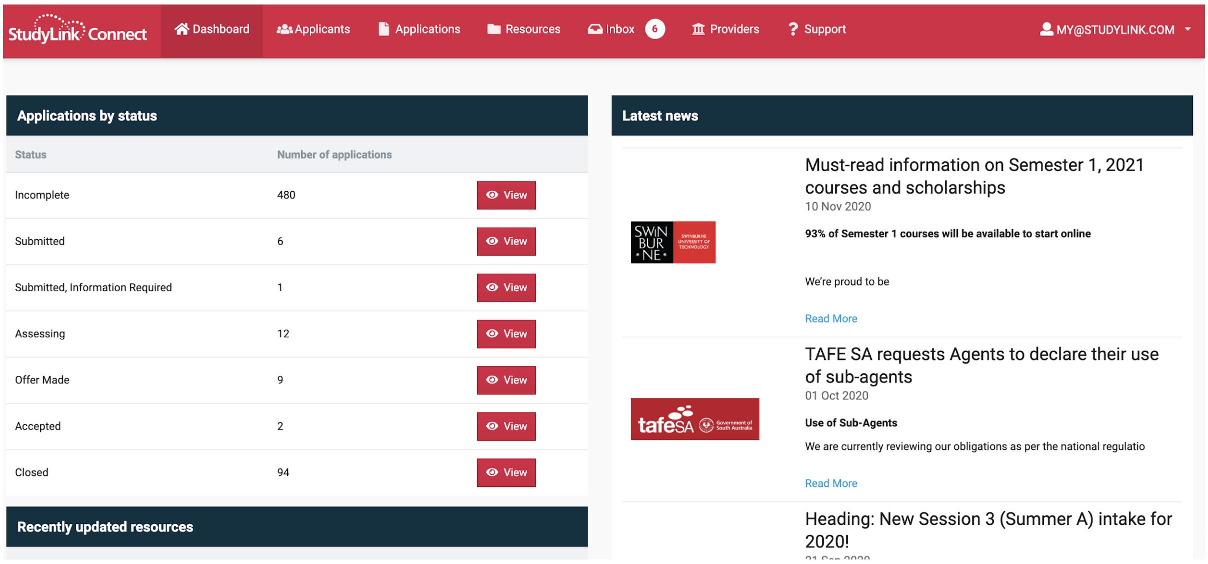
Partner Portal User Guide

Users with an existing account:

1. Go to partner.studylink.com
2. Enter your username and password and select **'Login'**.

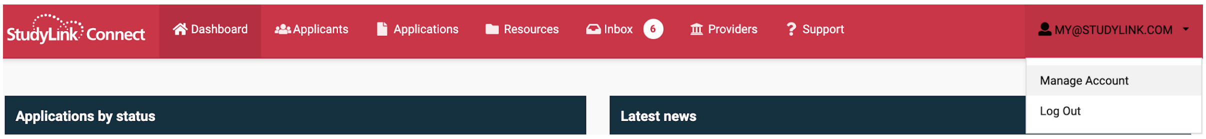


When you've logged in successfully you'll see the **'Dashboard'**.



The StudyLink Connect Partner Portal can be accessed from any web-enabled device by opening a web browser (e.g. Chrome, Mozilla Firefox, Safari, Internet Explorer) and typing the following link into the address bar: https://partner.studylink.com

Managing your account



The system menu appears when you select your username at the top right hand side of the screen. This menu is available on every screen within the Partner Portal and allows you to:

- Update your password
- Update your avatar picture (28 pixels x 28 pixels).

For security reasons, the system requires you to update your password every 180 days. Please ensure you do this to avoid interruptions to your access.

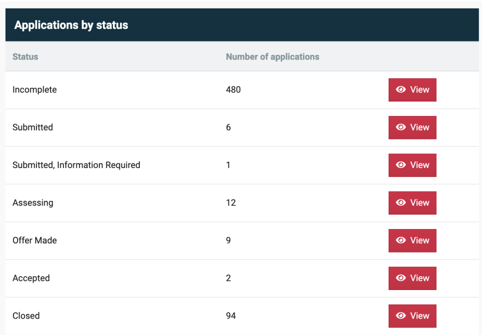
StudyLink Connect

Partner Portal User Guide

Dashboard

Application by status

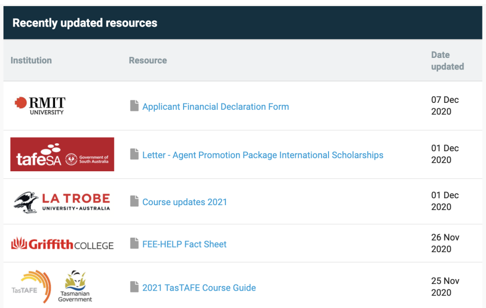
Select **'View'** as a simple way to see all applications categorised under a certain status.



Applications by status		
Status	Number of applications	
Incomplete	480	View
Submitted	6	View
Submitted, Information Required	1	View
Assessing	12	View
Offer Made	9	View
Accepted	2	View
Closed	94	View

Recently updated resources

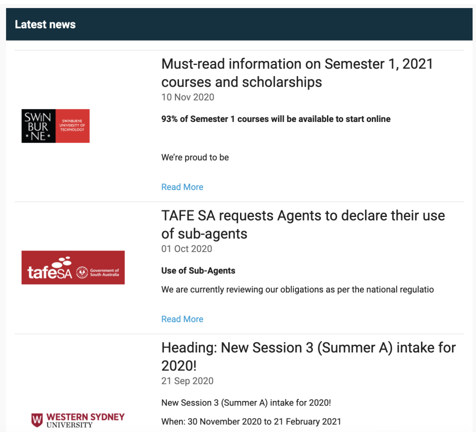
This is a list of documents and links to recently updated information from your institution partners. Simply click on the resource to access it.



Recently updated resources		
Institution	Resource	Date updated
RMIT UNIVERSITY	Applicant Financial Declaration Form	07 Dec 2020
tafeSA	Letter - Agent Promotion Package International Scholarships	01 Dec 2020
LA TROBE UNIVERSITY AUSTRALIA	Course updates 2021	01 Dec 2020
Griffith COLLEGE	FEE-HELP Fact Sheet	26 Nov 2020
TasTAFE / Tasmanian Government	2021 TasTAFE Course Guide	25 Nov 2020

Latest news

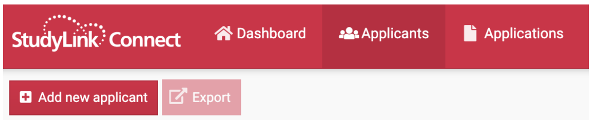
When institutions post news or updates directly to the Partner Portal, you'll see them here.



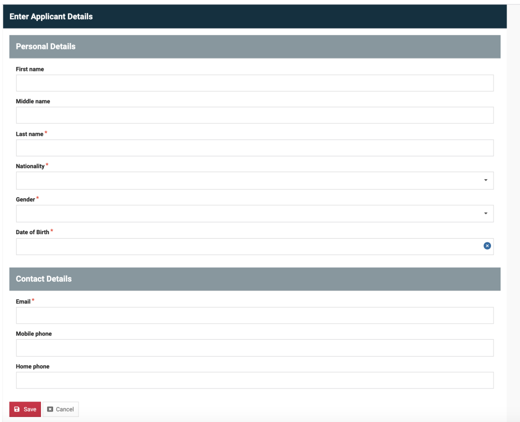
Applicants

Create a new applicant

1. Select the **'Applicants'** menu item
2. Select **'+Add new applicant'**



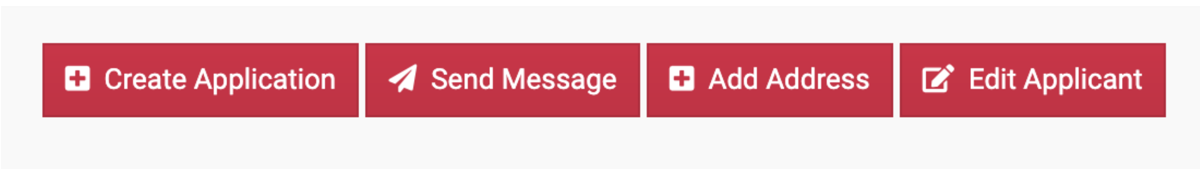
3. Enter as much information as possible in the **'Applicant details'** form, ensuring all mandatory fields are completed and **'Save'**.



Before you can create a new application, you need to create an applicant record. The applicant record contains basic information about the person including name, date of birth and contact details.

Edit applicant record

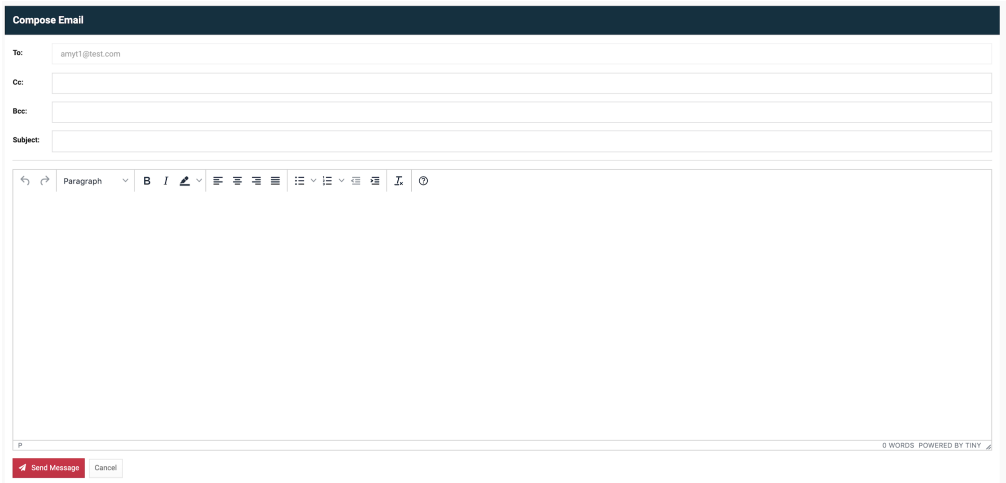
There are two options when editing an applicant record. Choose **'Edit Applicant'** to add or update any of the basic information, or **'Add Address'** to add a home or mailing address.



Partner Portal User Guide

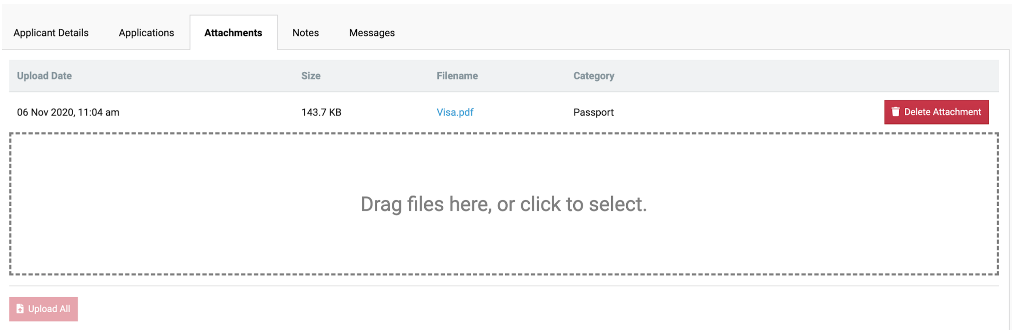
Send the applicant a message

1. Select **'Send Message'**
2. Enter the Subject and your message content and click **'Send'**.



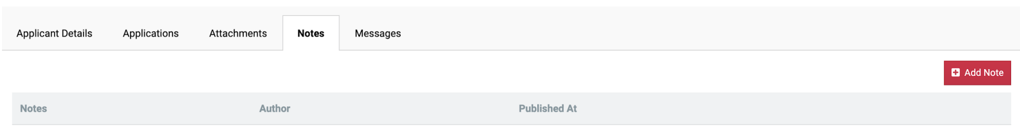
Add documents to an applicant's record

1. With the applicant record open, select the **'Attachments'** tab
2. Drag and drop the required files into the drop area or click within the drop area to select files from your computer.



Add notes to an applicant's record

1. With the applicant record open, select the **'Notes'** tab
2. Select **'Add Note'**, type the note content and **'Save'**.

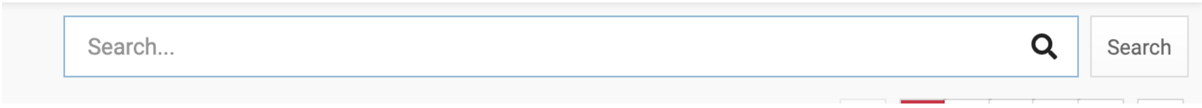


StudyLink Connect

Partner Portal User Guide

Search for an applicant

1. Select the **'Applicant'** menu item from the top of the screen
2. Click inside the **'Search'** bar and enter the first or last name, application ID or course name of the application you're searching for, then **'Search'**.

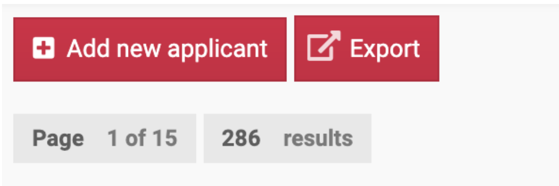


View an applicant's record

Once you have located the applicant's record using the **'Search'** function, select **'View'** to the right of the record to open it.

Export applicants' details

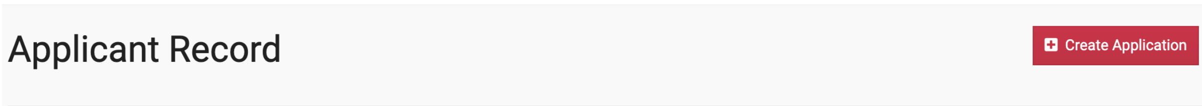
Once you have located the applicant record using the **'Search'** function, select the checkbox to the left of the record/s you'd like to include and click **'Export'**.



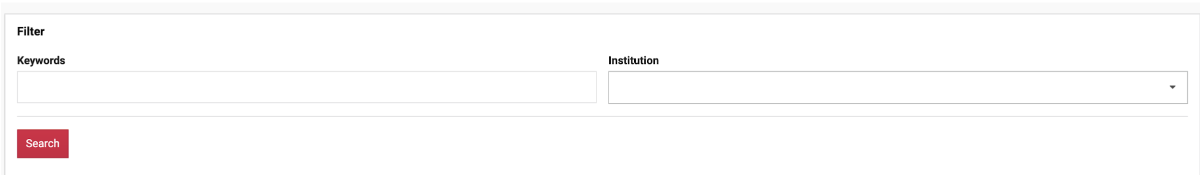
This exports the applicant/s details to a .CSV file including first name, last name, citizenship, date of birth, email address, mobile and home phone.

Create an application

1. Locate the applicant using the **'Search'** function on the **'Applicants'** screen
2. Click **'View'** to the right of the Applicant Record to open
3. Select **'+ Create Application'** from the top right of the screen

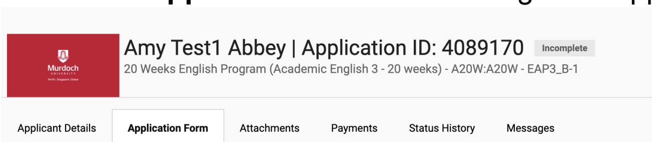


4. Click in the **'Filter'** area to expand the filter options



5. Enter/select the filters required to locate the course the applicant has expressed interest in studying and **'Search'**
6. Select **'+Apply'** to the right of the course the applicant wishes to apply for (the applicant screen is displayed, along with a message indicating that a new application has been created)

7. Select the **'Application Form'** tab to begin the application

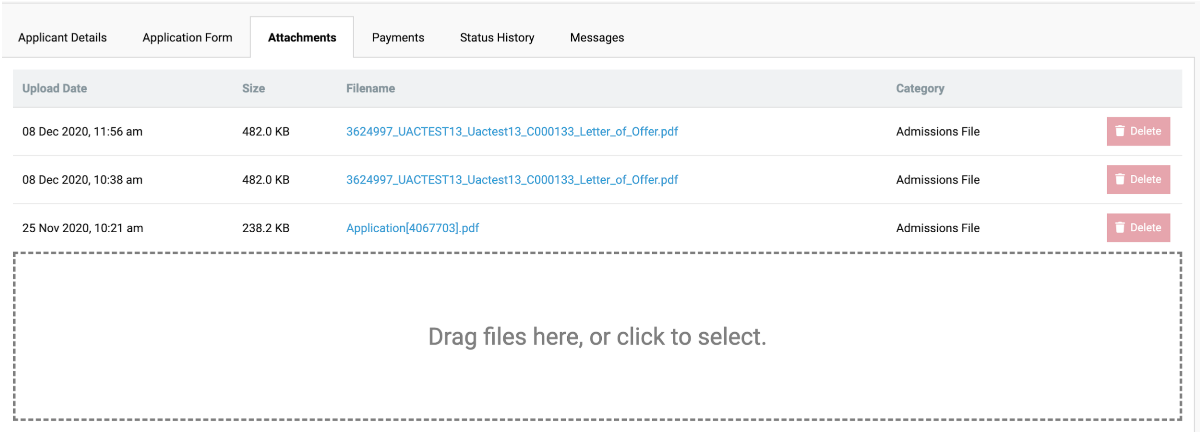


8. The application form is displayed and the relevant information from the applicant record is pre-populated. Complete the remaining fields as required, noting that mandatory fields are indicated with an asterisk.

If you wish to save the application without completing, click **'Save & Close'** at the bottom of the screen. Once all mandatory fields have been completed click **'Next'.**

Documents that are required to be uploaded are displayed in the **'Required documentation'** table and are based on questions in the application form that specify the need for supporting documents. Choose from the following three options:

1. Upload a single file containing all documents
2. Upload documents individually
3. Select documents previously uploaded while completing the application form.



9. Once complete, click **'Save'**

10. Select **'Next'** to continue

11. Select **'Submit application'** on the confirmation screen

12. The application submission is confirmed.

An application cannot be created until the applicant record has been created. Some of the information entered on the applicant record is mapped to fields on the application form to speed up the application creation process.

The system prevents you from applying for the same course for the same applicant at the same institution twice. An applicant may, however, submit multiple applications to different institutions

Managing applications

Search for an application

1. There are two ways you can use to search for applications:

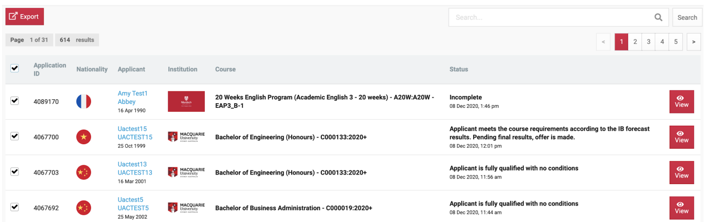
    1. Select the **'Dashboard'** menu item and view the applications categorised under a particular status
    2. Select the **'Application'** tab and type the first name or last name of the applicant in the **'Search'** area.

The application menu provides a list of all applications in each status (20 records are displayed at a time). From this screen you're able to export application details, search for particular applications and view applications.

Export application details

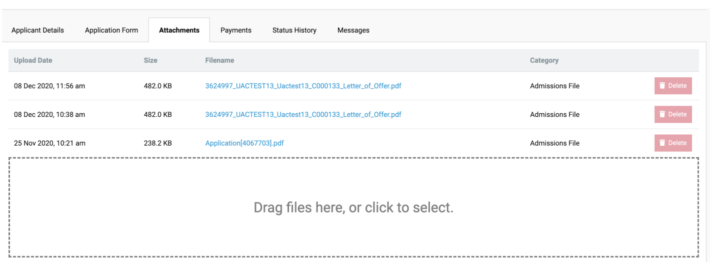
1. Select the **'Applications'** menu item from the top of the screen

2. Select the checkbox next to each application you'd like to include (details will be generated in .CSV format).



Attach supporting documents to an application

1. Open the application and select the **'Attachments'** tab
2. Drag or select the documents you'd like to attach.



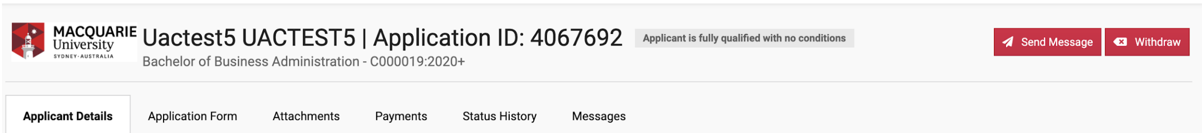
*Documents that have previously been uploaded can be attached via the Attachments tab. You can also use the **'Delete'** button to delete documents.*

View status history

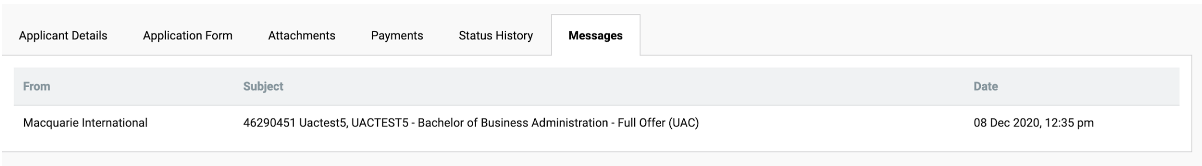
Select the **'Status History'** tab in an application to view a list of statuses the application has moved through during processing.

Send a message to an institution

1. Select the **'Message'** tab from within the application
2. Enter the subject and message content then **'Send'**.

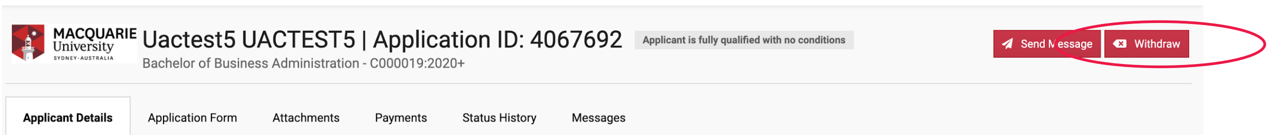


You'll also see previous messages listed at the bottom of the screen.



Withdraw an application

From within the application select **'Withdraw'** in the top right corner.



The Withdraw button is only available to applications in certain statuses. The statuses for which the withdraw feature is available can be individually configured by your institution partner so may differ from one institution to another.

*In addition, if you do not see the **'Withdraw'** button then this function is not configured for the institution partner and you will need to send an email to the institution requesting the application be withdrawn.*

Respond to an offer from an institution

Once an institution has completed assessing an application, they will prepare a letter of offer for the applicant. As an Agent, you are then able to progress that offer by accepting, rejecting or deferring the offer for institutions that support online acceptance.

1. Locate the conditional offer from the **'Dashboard'** menu option
2. Select **'View'** to the right of the application
3. Select **'Respond to Offer'** – you will be presented with three options:
   1. Accept offer
   2. Reject offer
   3. Defer offer

When you **accept an offer** you will be presented with two options:

1. To be directed to the payment provider to make the deposit payment
2. To receive a link you can send to the student to make payment.


Offer Details

Date of Offer: 08-Dec-20

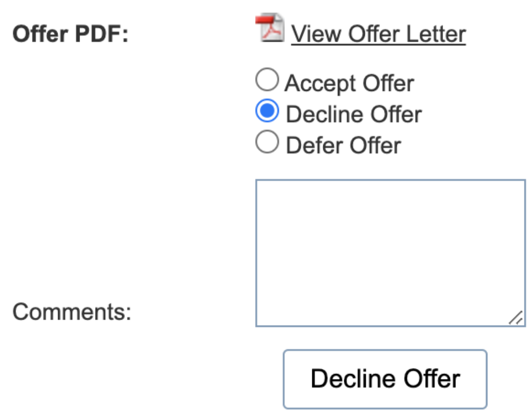
Acceptance Fee: $13200

Payable Now: $13200

Offer PDF: View Offer Letter

Accept Offer
Decline Offer
Defer Offer

When you **reject an offer** you can enter any relevant comments in the **'Comments'** text area.

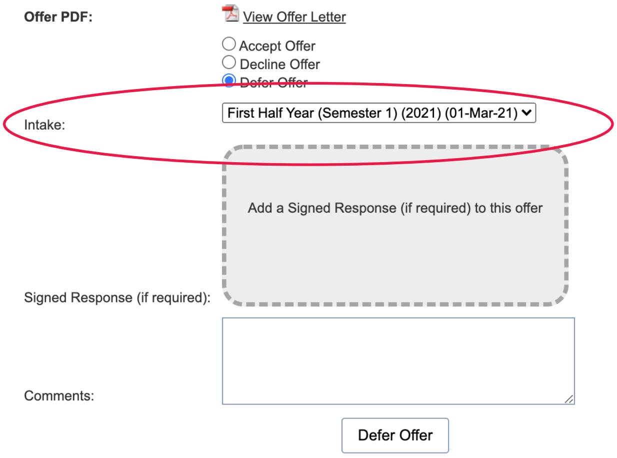

Offer PDF: View Offer Letter

Accept Offer
Decline Offer
Defer Offer

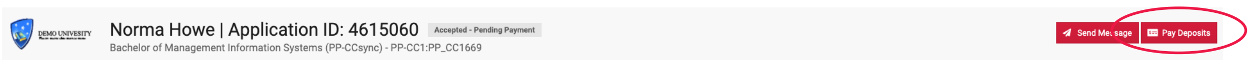
Comments:

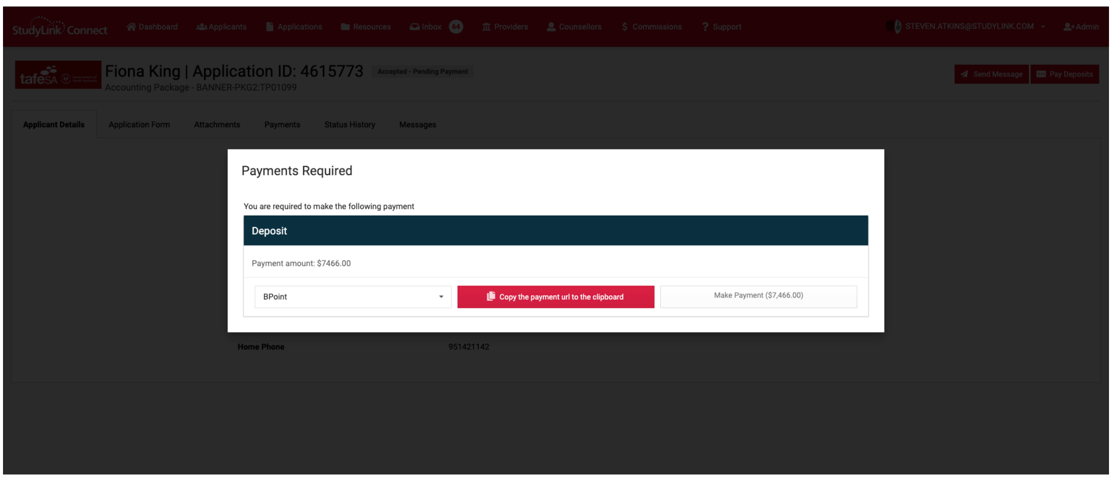
Decline Offer

When you **defer an offer**, you are required to select the intended intake from the drop down list provided.



*For some institutions you may also pay deposit amounts for applications post offer using the **'Pay Deposit'** button.*

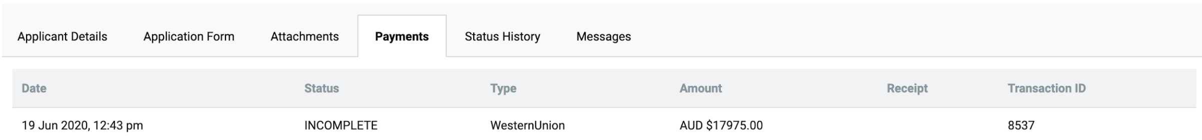




Payments

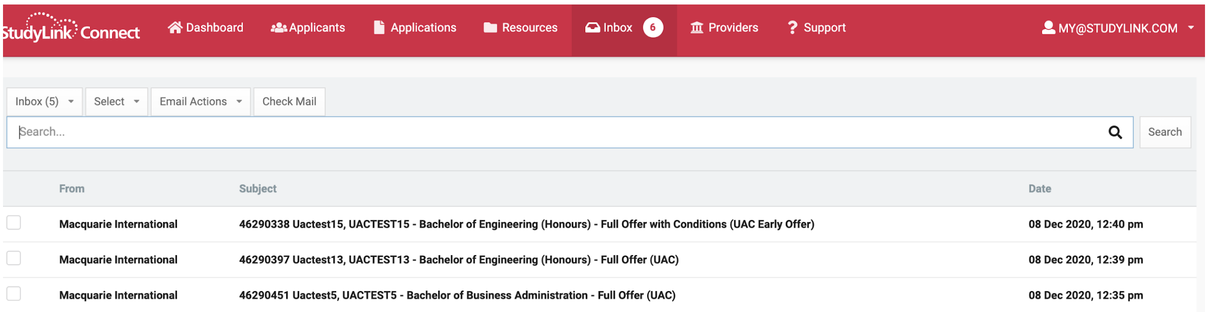
The **'Payments'** tab allows Agents to view all the financial transactions associated with an application.

1. View an application categorised in a post offer status
2. Select the **'Payments'** tab to view a list of transactions.



Inbox

To view an email sent from an institution to your Agency about an application, select the **'Inbox'** menu item from the top the screen.



Sending messages

You can email an applicant via the **'Message'** tab in the Applicant record.

You can email your institution partner via the **'Message'** tab in the Application record.

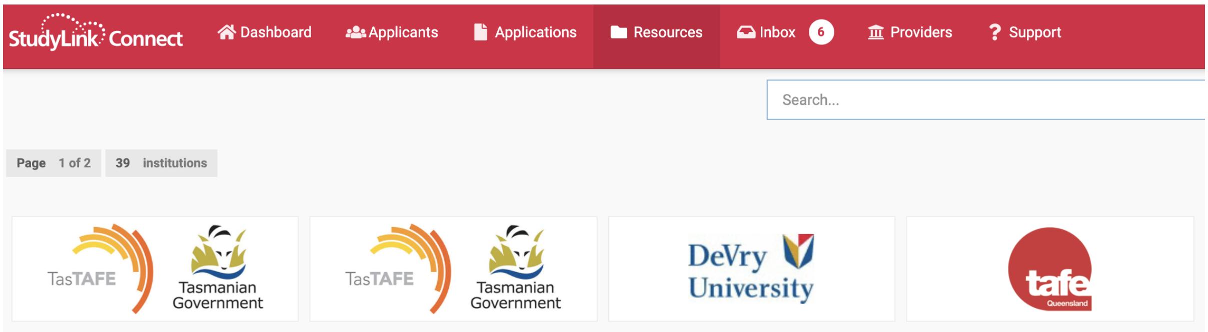
Referencing messages

You'll find a full message history between you and your institution partner, or you and your applicant, in your inbox.

Search for the email you're looking for using either an applicant's name or the Application ID.

Resources

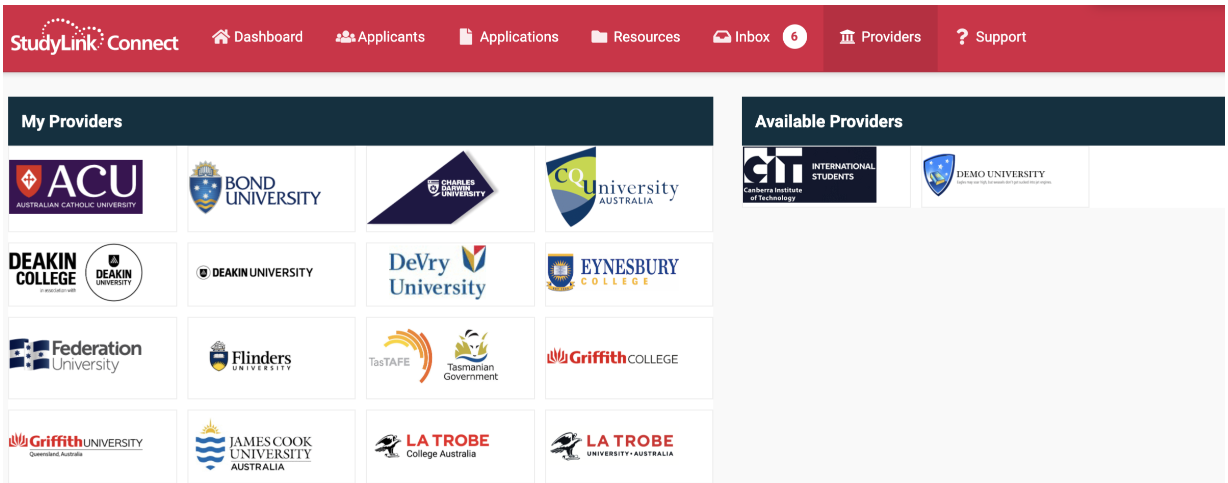
1. To view documents, or access the links your institution partner has made available to you, select the **'Resources'** menu item at the top of the screen
2. A list of the institutions your Agency works with will be displayed
3. Select an institution to view the resources they've made available.



If you can't find what you're looking for, please contact your institution partner.

Providers

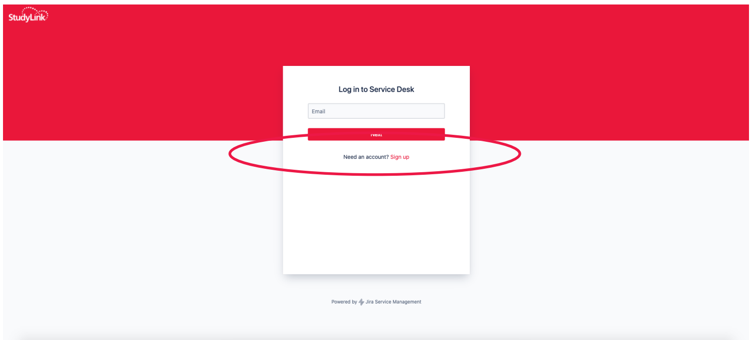
1. Select the **'Providers'** menu item at the top of the screen
2. The institutions you work with, who currently accept applications via StudyLink Connect, are included in this section under **'My Providers'**.

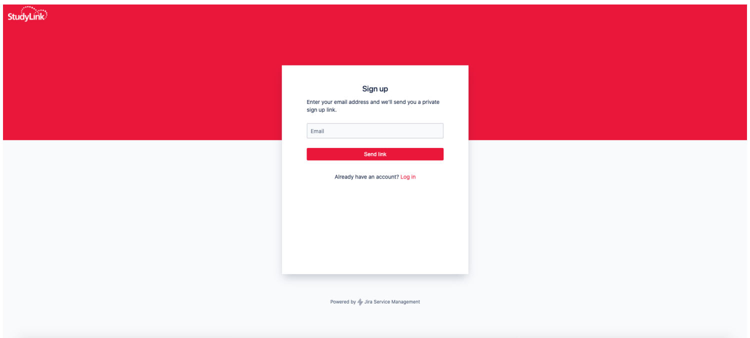


Partner Portal User Guide

Support

We're always here if you need assistance. New users will need to create an account to access Support. This can set up via the login screen.



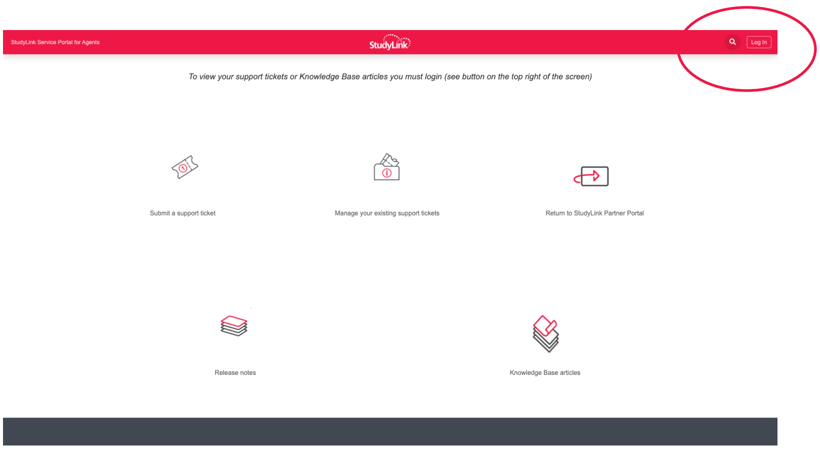


Or, [watch the video](#).

Once you've logged in, simply submit a support request (ticket) from the **'Support'** menu item. Please provide as much information as possible and screenshots to help us resolve your issue as quickly as possible.

You can submit and manage tickets and also view a full message history of all the tickets you raise.

You'll also find useful 'how to' articles, tips and videos to help you get the most out of StudyLink Connect.



StudyLink Connect

Partner Portal User Guide

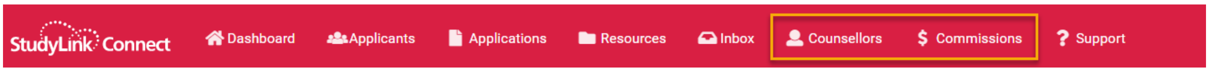
'User' types and roles

Different 'User' roles

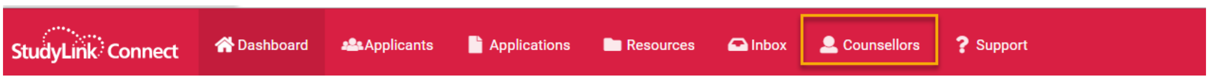
There are four roles available including: Agency Administrator, Branch Administrator, Counsellor and Finance. Each of these roles has different permissions that allow or dis-allow access to specific areas of the Partner Portal.

The **Agency Administrator** role is the highest in the role hierarchy and therefore has the highest permissions and access. The Agency Administrator has visibility of the **'Counsellors'** and **'Commissions'** tabs, and can:

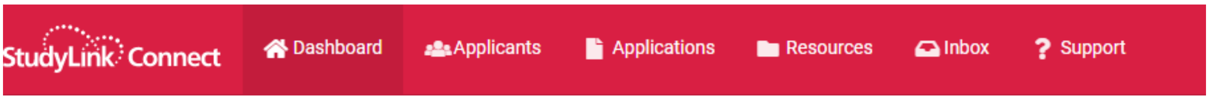
- Create and manage Counsellor accounts
- View and execute Commission runs.



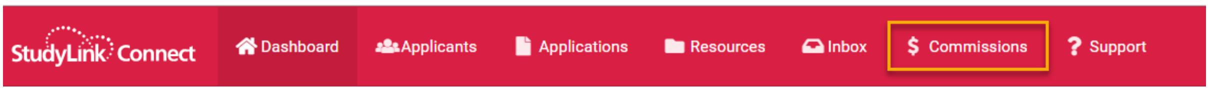
The **Branch Administrator** role is the next level in the role hierarchy and has visibility of the **'Counsellors'** tab. The Branch Administrator can create and manage Counsellor accounts.



The **Counsellor** is the next role in the hierarchy and can view and manage applicant and application information in their own branch.



The **Finance** role is for executing Commission runs only and has the same privileges as the Counsellor role.

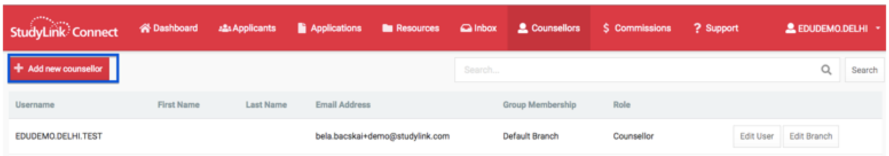


Partner Portal User Guide

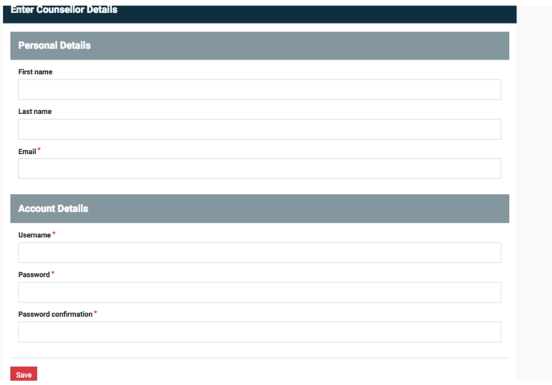
<This section explains functions that can be performed by Agency and Branch Administrators>

Create a new Counsellor account

1. Select the **'Counsellors'** menu item
2. Select **'+ Add new Counsellor'**

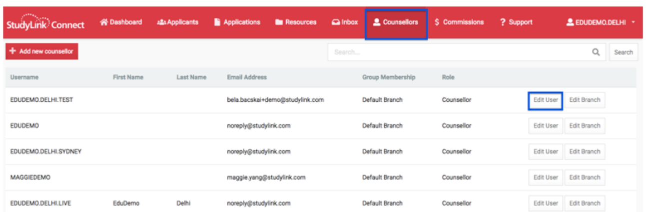


3. Enter the Counsellor's personal details
4. Enter the Username and password, and **'Save'.**

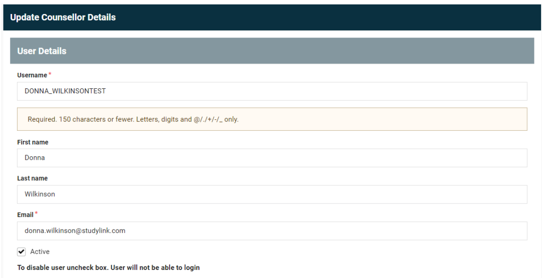


Manage Counsellor details

1. Select the **'Counsellors'** menu item
2. Locate the Counsellor record you wish to change and select **'Edit User'**

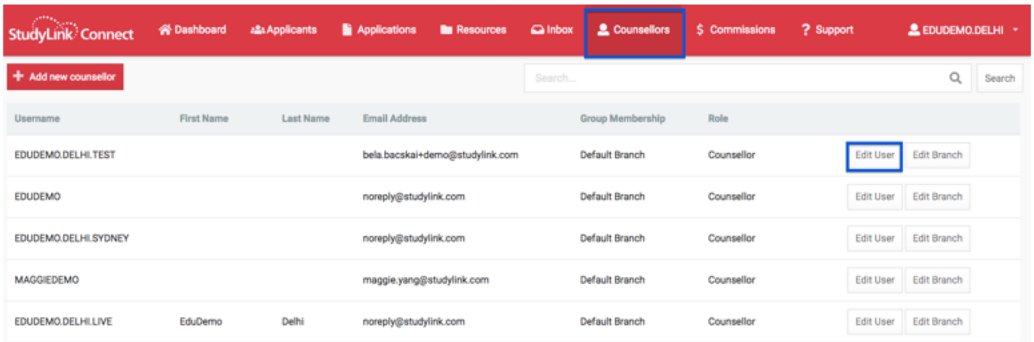


3. Change the 'Username', 'First name', 'Last name' and/or 'Email address'.



Change a Counsellor's role

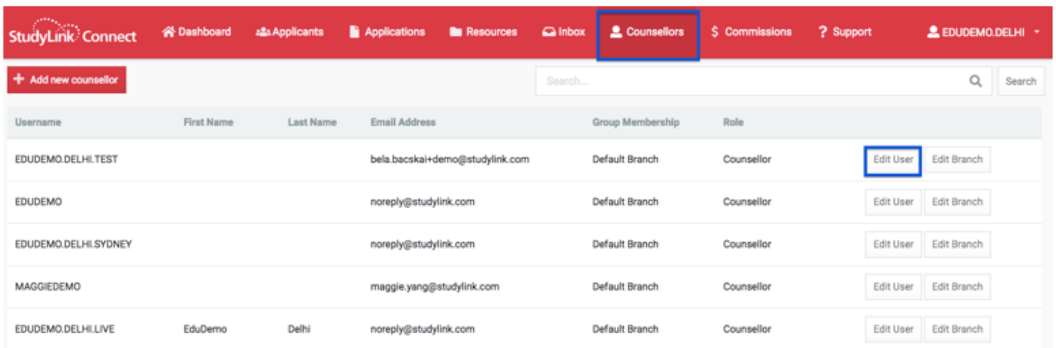
1. Select the **'Counsellors'** menu item
2. Locate the Counsellor record you wish to change and select **'Edit'**



3. Select the **'Role'** drop down arrow
4. Select the role you wish to change the user to
5. Select **'Save'.**

Disable a Counsellor's account

1. Select the **'Counsellors'** menu item
2. Locate the Counsellor record you wish to change and select **'Edit'**



3. Disable a user by un-ticking the **'Active'** checkbox.