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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>



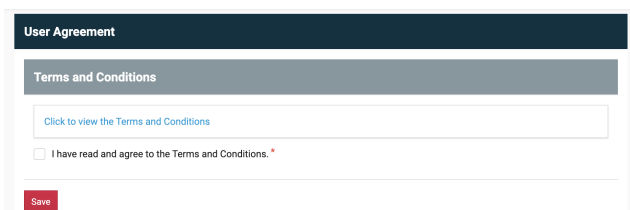
The screenshot shows a 'Reset Password' form with a dark blue header. Below the header is a white input field labeled 'Email *'. At the bottom of the form is a red 'Reset' button.

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)



The screenshot shows an 'Enter Your Details' form with a dark blue header. It is divided into two sections: 'User Details' and 'Agency Details'. The 'User Details' section includes input fields for Username *, First name, Last name, Email *, Password *, and Password confirmation *. The 'Agency Details' section includes a dropdown menu for Branch *. A red 'Save' button is located at the bottom left.

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**'.



The screenshot shows a 'User Agreement' form with a dark blue header. It features a section titled 'Terms and Conditions' with a link that says 'Click to view the Terms and Conditions'. Below this is a checkbox labeled 'I have read and agree to the Terms and Conditions. *'. A red 'Save' button is at the bottom left.

Partner Portal User Guide

Users with an existing account:

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

Login

Username: *

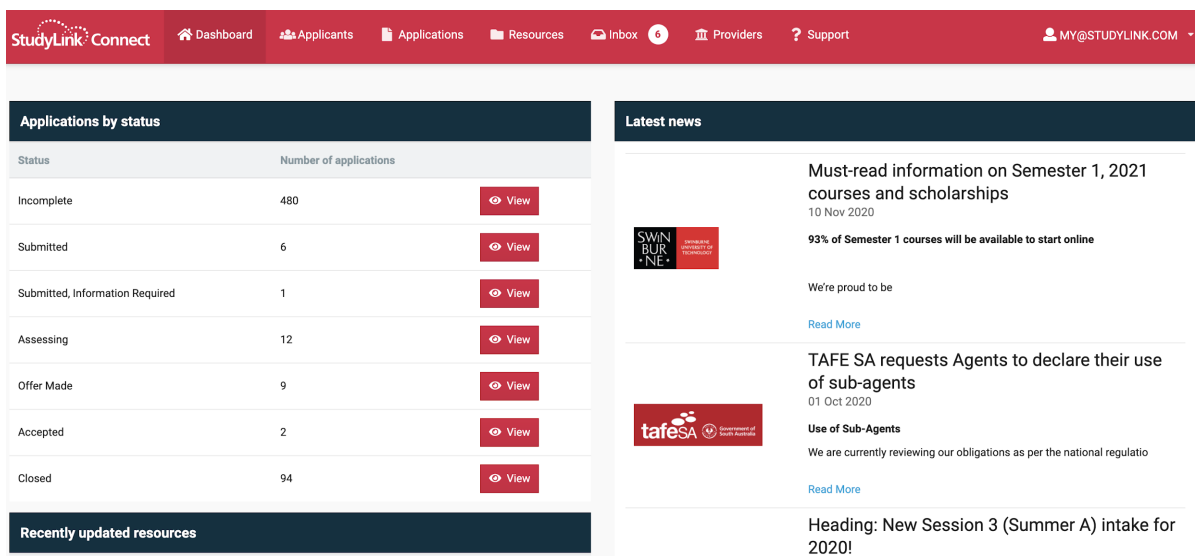
Password: *

Keep me logged in

[Login](#)

[I forgot my password](#)

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



The dashboard features a red navigation bar with the following items: StudyLink Connect, Dashboard, Applicants, Applications, Resources, Inbox (6), Providers, Support, and a user profile icon labeled MY@STUDYLINK.COM.

Applications by status

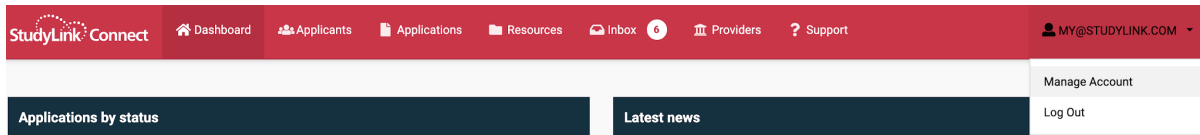
Status	Number of applications	View
Incomplete	480	View
Submitted	6	View
Submitted, Information Required	1	View
Assessing	12	View
Offer Made	9	View
Accepted	2	View
Closed	94	View

Latest news

- Must-read information on Semester 1, 2021 courses and scholarships**
10 Nov 2020
93% of Semester 1 courses will be available to start online
We're proud to be
[Read More](#)
- TAFE SA requests Agents to declare their use of sub-agents**
01 Oct 2020
Use of Sub-Agents
We are currently reviewing our obligations as per the national regulation
[Read More](#)
- Heading: New Session 3 (Summer A) intake for 2020!**
21 Nov 2020

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.



The screenshot shows a 'Change Password' form. The form has a dark blue header with the text 'Change Password'. Below the header, there are three input fields, each with a red asterisk indicating a required field. The first field is labeled 'Old password *', the second is 'New password *', and the third is 'New password confirmation *'. At the bottom left of the form, there is a red 'Save' button.

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	2021 TasTAFE Course Guide	25 Nov 2020

Latest news

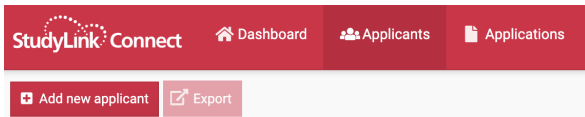
When institutions post news or updates directly to the Partner Portal, you'll see them here.

Latest news	
	<p>Must-read information on Semester 1, 2021 courses and scholarships 10 Nov 2020</p> <p>93% of Semester 1 courses will be available to start online</p> <p>We're proud to be</p> <p>Read More</p>
	<p>TAFE SA requests Agents to declare their use of sub-agents 01 Oct 2020</p> <p>Use of Sub-Agents</p> <p>We are currently reviewing our obligations as per the national regulatio</p> <p>Read More</p>
	<p>Heading: New Session 3 (Summer A) intake for 2020! 21 Sep 2020</p> <p>New Session 3 (Summer A) intake for 2020!</p> <p>When: 30 November 2020 to 21 February 2021</p>

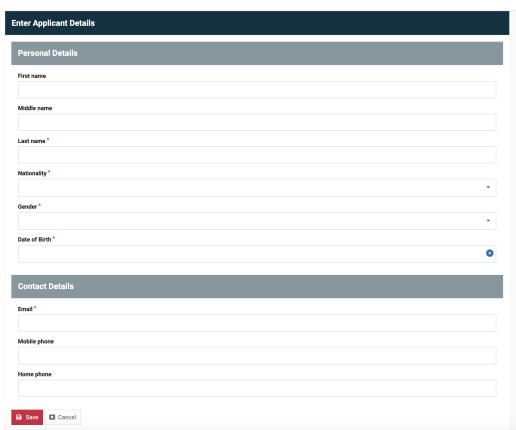
Applicants

Create a new applicant

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



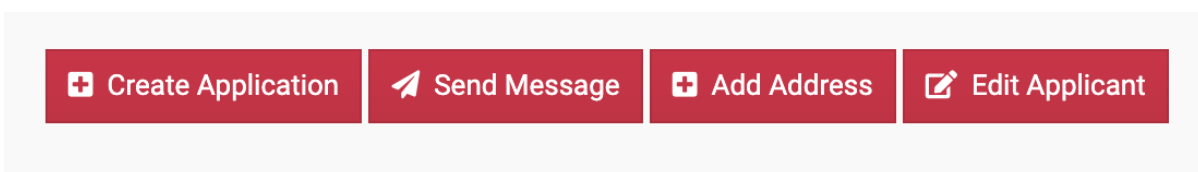
3. Enter as much information as possible in the **'Applicant details'** form, ensuring all mandatory fields are completed and **'Save'**.



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.

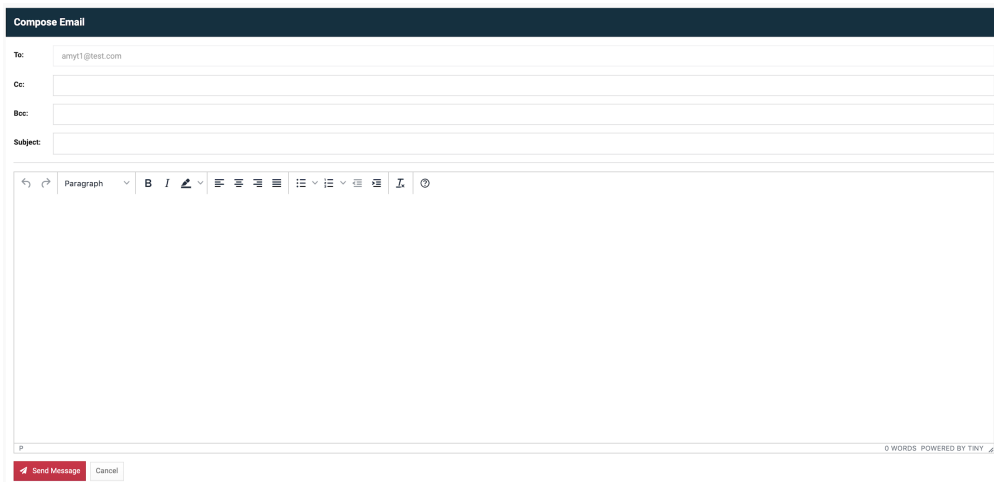
Edit applicant record

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.



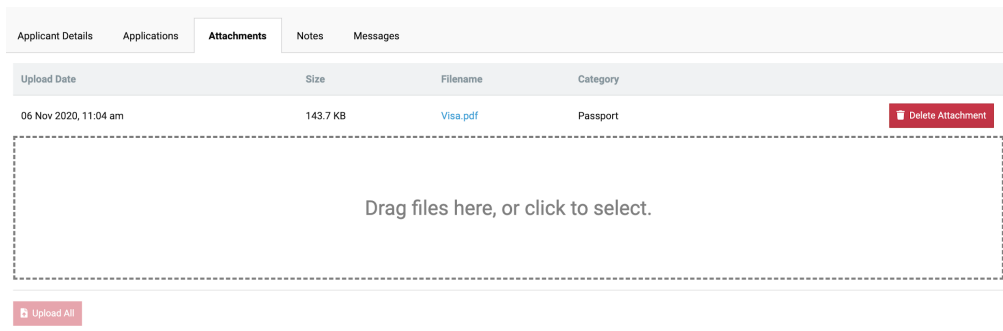
Send the applicant a message

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



Add documents to an applicant's record

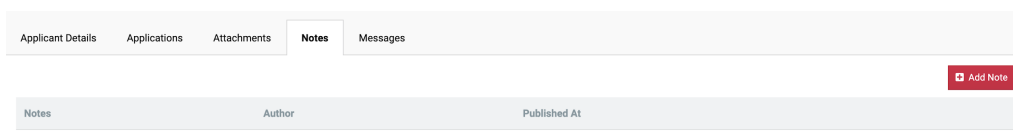
1. With the applicant record open, select the **'Attachments'** tab
2. Drag and drop the required files into the drop area or click within the drop area to select files from your computer.



Upload Date	Size	Filename	Category	
06 Nov 2020, 11:04 am	143.7 KB	Visa.pdf	Passport	Delete Attachment

Add notes to an applicant's record

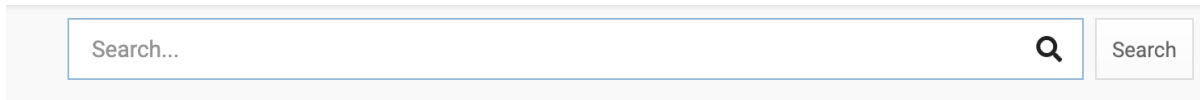
1. With the applicant record open, select the **'Notes'** tab
2. Select **'Add Note'**, type the note content and **'Save'**.



Notes	Author	Published At
-------	--------	--------------

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'**.



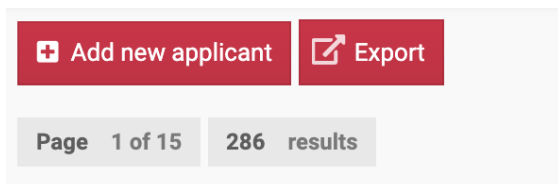
View an applicant's record

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.

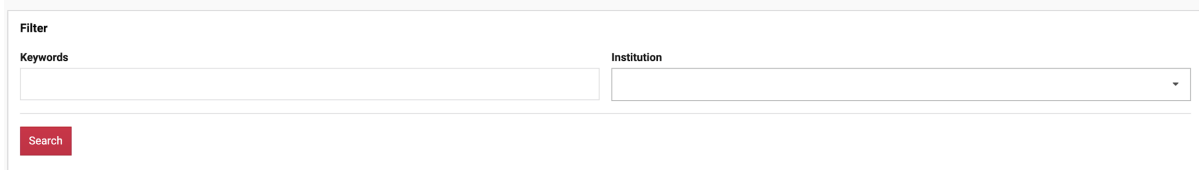
Create an application

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

Applicant Record



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)

20 Weeks English Program (Academic English 2 - 20 weeks) - A20W:A20W - EAP2_B

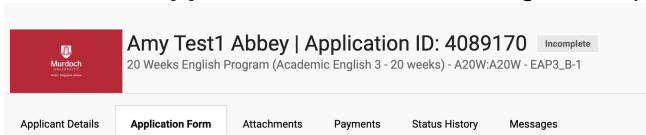
Full Time

ELICOS





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'**.

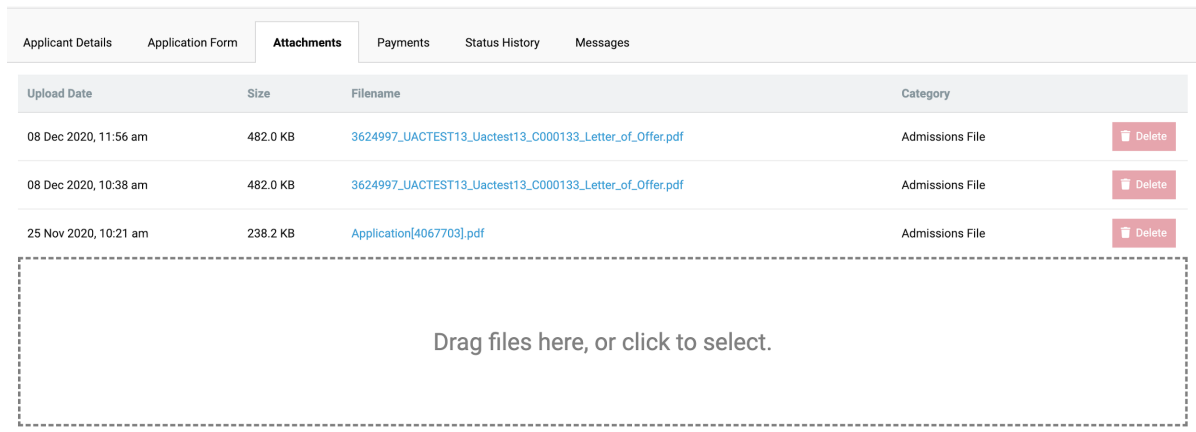




Partner Portal User Guide

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.



Upload Date	Size	Filename	Category	
08 Dec 2020, 11:56 am	482.0 KB	3624997_UACTEST13_Uactest13_C000133_Letter_of_Offer.pdf	Admissions File	Delete
08 Dec 2020, 10:38 am	482.0 KB	3624997_UACTEST13_Uactest13_C000133_Letter_of_Offer.pdf	Admissions File	Delete
25 Nov 2020, 10:21 am	238.2 KB	Application[4067703].pdf	Admissions File	Delete

Drag files here, or click to select.

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

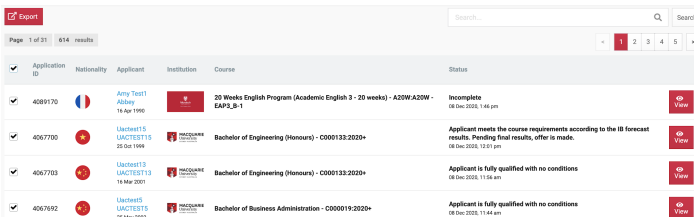
Search for an application

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

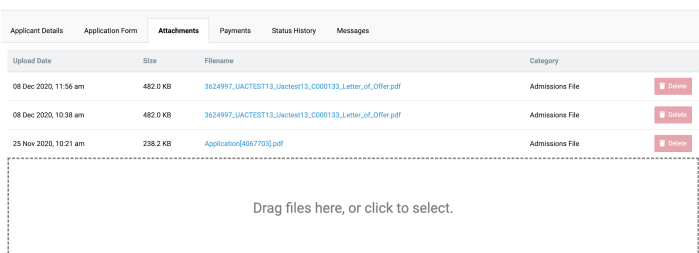
1. Select the **'Applications'** menu item from the top of the screen
2. Select the checkbox next to each application you'd like to include (details will be generated in .CSV format).



Application ID	Nationality	Applicant	Institution	Course	Status
4089170	FR	Jony Theil 16 Apr 1990	UNIVERSITY OF SOUTH ALABAMA	20 Weeks English Program (Academic English 3 - 20 weeks) - A20W A20W - EAP3_20-1	Incomplete 08 Dec 2020, 11:48 pm
4067700	FR	UACTEST15 UACTEST15 25 Oct 1994	UNIVERSITY OF SOUTH ALABAMA	Bachelor of Engineering (Honours) - C000133.2020+	Applicant meets the course requirements according to the II forecast results. Pending final results, offer to make. 08 Dec 2020, 12:21 pm
4067703	FR	UACTEST13 UACTEST13 16 Mar 2001	UNIVERSITY OF SOUTH ALABAMA	Bachelor of Engineering (Honours) - C000133.2020+	Applicant is fully qualified with no conditions 08 Dec 2020, 11:58 am
4067692	FR	UACTEST5 UACTEST5 25 Nov 1992	UNIVERSITY OF SOUTH ALABAMA	Bachelor of Business Administration - C000019.2020+	Applicant is fully qualified with no conditions 08 Dec 2020, 11:44 am

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.



Upload Date	Size	Filename	Category
08 Dec 2020, 11:56 am	482.0 KB	3624997_UACTEST13_Uactest13_C000133_Letter_of_Offer.pdf	Admissions File
08 Dec 2020, 10:38 am	482.0 KB	3624997_UACTEST13_Uactest13_C000133_Letter_of_Offer.pdf	Admissions File
25 Nov 2020, 10:21 am	238.2 KB	Application(4067703).pdf	Admissions File

Drag files here, or click to select.

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

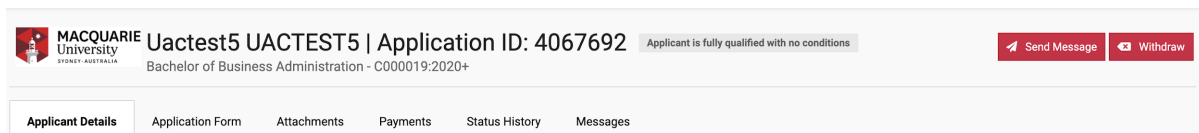
Partner Portal User Guide

View status history

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

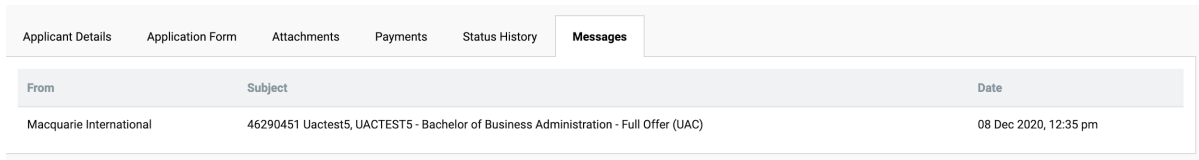
Send a message to an institution

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



The screenshot shows the top navigation bar with the Macquarie University logo, application name 'Uactest5 UACTEST5', application ID '4067692', and a status 'Applicant is fully qualified with no conditions'. Below the navigation bar, the 'Messages' tab is selected, and the 'Send Message' and 'Withdraw' buttons are visible in the top right corner.

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

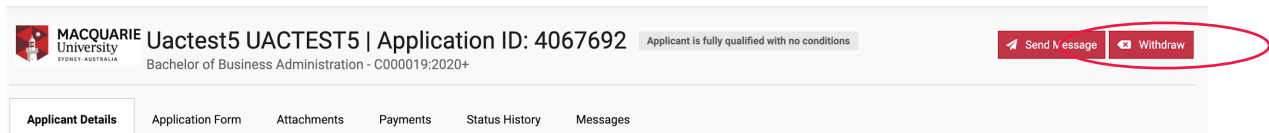


The screenshot shows the 'Messages' tab selected in the navigation bar. Below the navigation bar, a table lists previous messages. The table has columns for 'From', 'Subject', and 'Date'.

From	Subject	Date
Macquarie International	46290451 Uactest5, UACTEST5 - Bachelor of Business Administration - Full Offer (UAC)	08 Dec 2020, 12:35 pm

Withdraw an application

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



The screenshot shows the top navigation bar with the Macquarie University logo, application name 'Uactest5 UACTEST5', application ID '4067692', and a status 'Applicant is fully qualified with no conditions'. Below the navigation bar, the 'Withdraw' button is circled in red, indicating it is the focus of the section.

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.*

Partner Portal User Guide

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:

Partner Portal User Guide

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

Offer PDF: [View Offer Letter](#)

Accept Offer
 Decline Offer
 Defer Offer

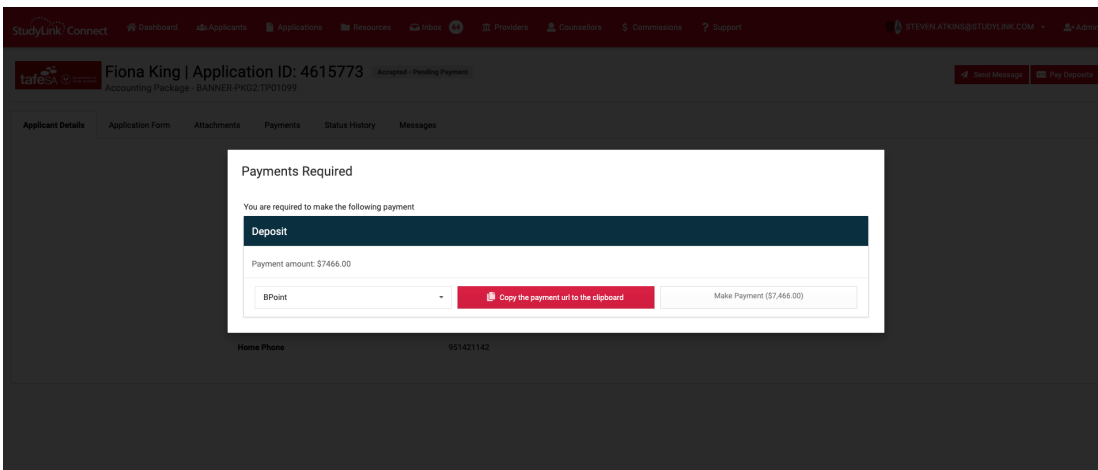
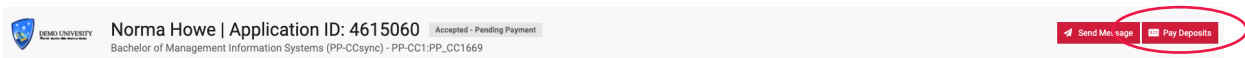
Intake:

Add a Signed Response (if required) to this offer

Signed Response (if required):

Comments:

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



Payments

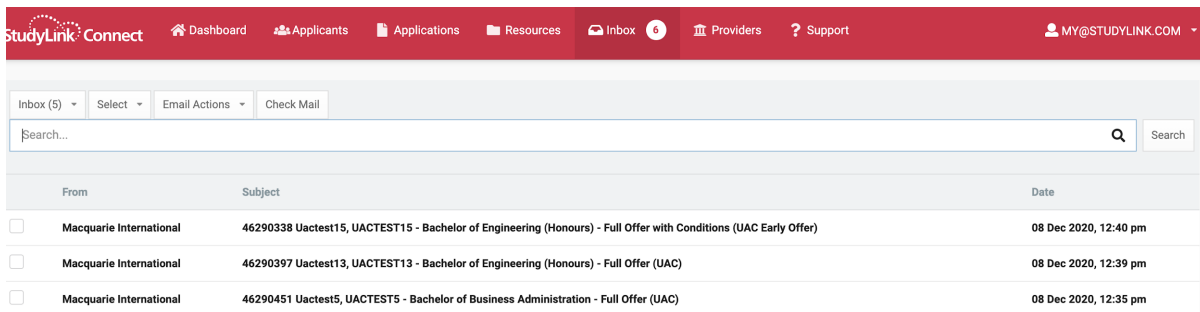
The **'Payments'** tab allows Agents to view all the financial transactions associated with an application.

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

Date	Status	Type	Amount	Receipt	Transaction ID
19 Jun 2020, 12:43 pm	INCOMPLETE	WesternUnion	AUD \$17975.00		8537

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.



The screenshot shows the StudyLink Connect interface with a red navigation bar at the top. The 'Inbox' menu item is highlighted with a notification badge showing '6'. Below the navigation bar, there is a search bar and a list of email entries. The list has columns for 'From', 'Subject', and 'Date'. Three email entries are visible, all from 'Macquarie International'.

From	Subject	Date
Macquarie International	46290338 Uactest15, UACTEST15 - Bachelor of Engineering (Honours) - Full Offer with Conditions (UAC Early Offer)	08 Dec 2020, 12:40 pm
Macquarie International	46290397 Uactest13, UACTEST13 - Bachelor of Engineering (Honours) - Full Offer (UAC)	08 Dec 2020, 12:39 pm
Macquarie International	46290451 Uactest5, UACTEST5 - Bachelor of Business Administration - Full Offer (UAC)	08 Dec 2020, 12:35 pm

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.

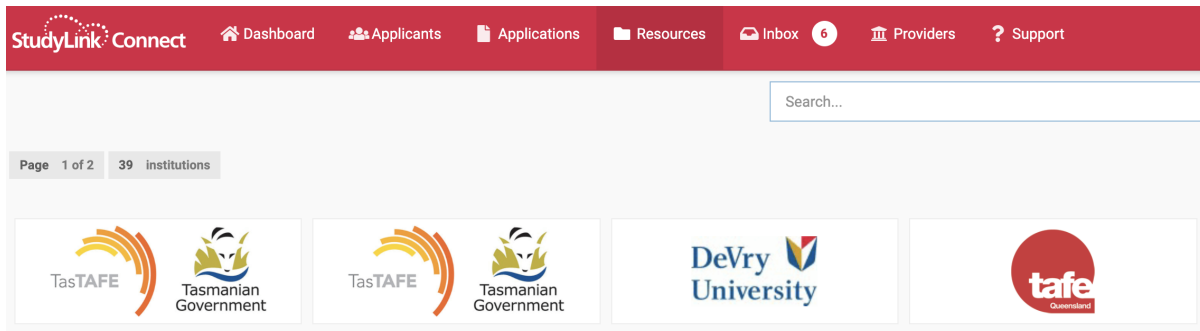
Referencing messages

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

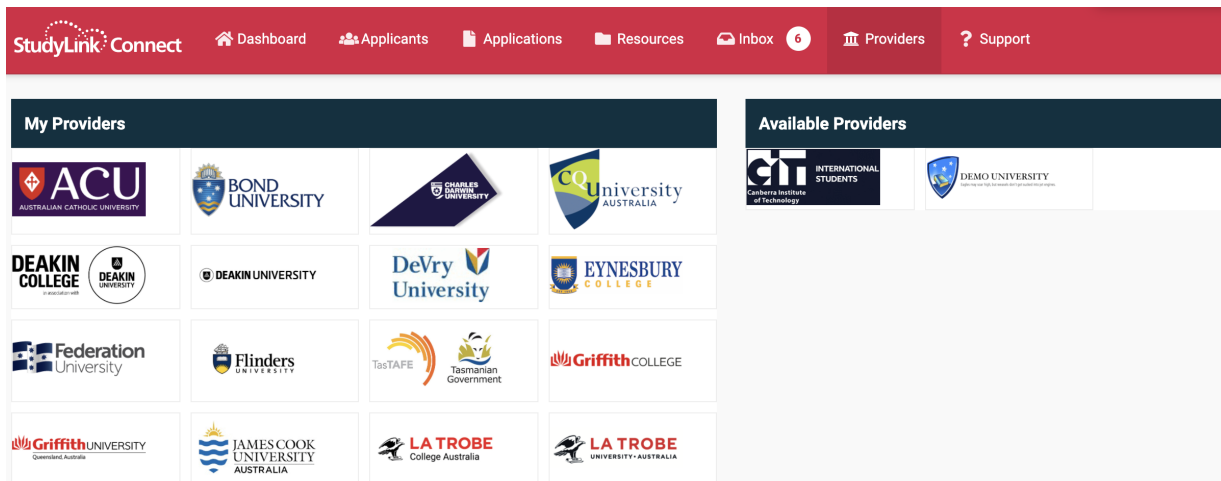
1. To view documents, or access the links your institution partner has made available to you, select the **'Resources'** menu item at the top of the screen
2. A list of the institutions your Agency works with will be displayed
3. Select an institution to view the resources they've made available.



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

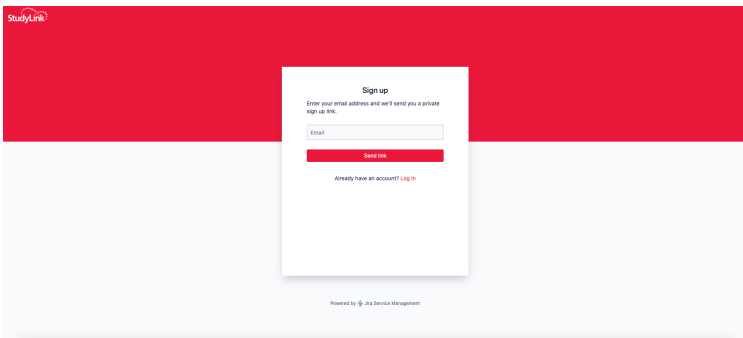
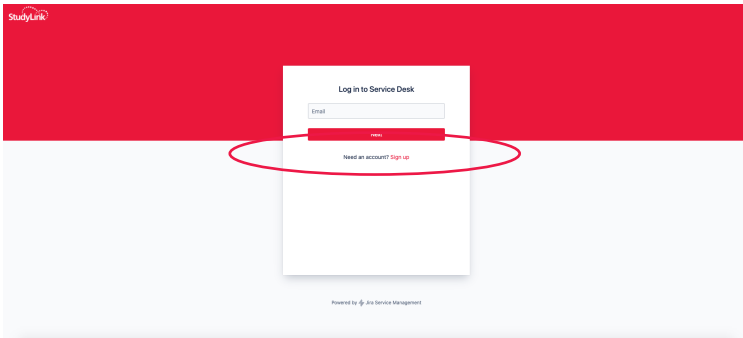
Providers

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'**.



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.

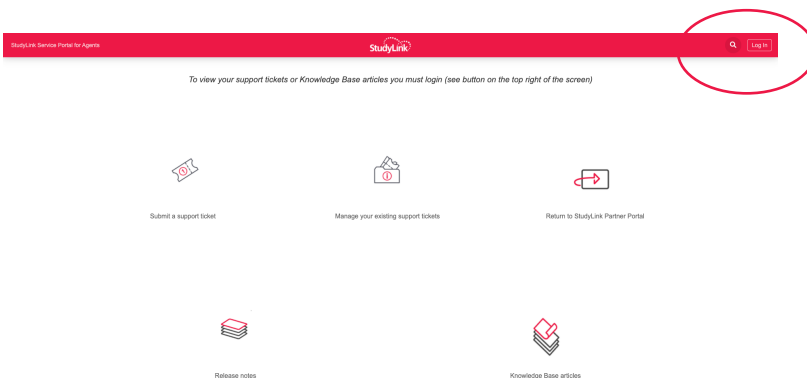


Or, [watch the video](#).

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.



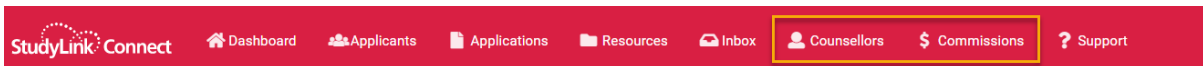
'User' types and roles

Different 'User' roles

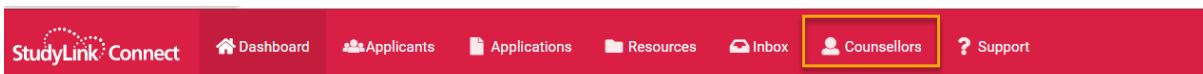
There are four roles available including: Agency Administrator, Branch Administrator, Counsellor and Finance. Each of these roles has different permissions that allow or dis-allow access to specific areas of the Partner Portal.

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:

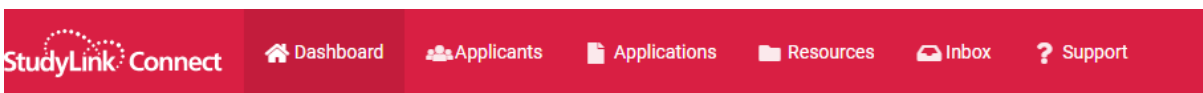
- Create and manage Counsellor accounts
- View and execute Commission runs.



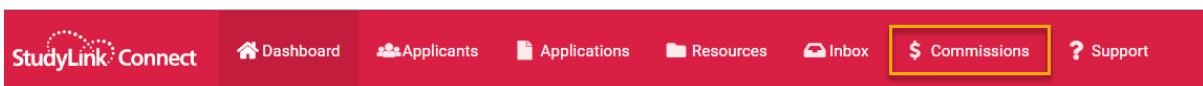
The **Branch Administrator** role is the next level in the role hierarchy and has visibility of the '**Counsellors**' tab. The Branch Administrator can create and manage Counsellor accounts.



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.

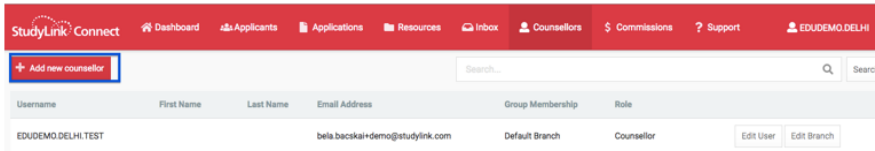


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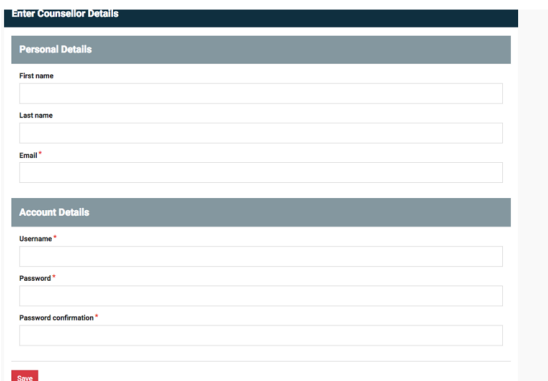
<This section explains functions that can be performed by Agency and Branch Administrators>

Create a new Counsellor account

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



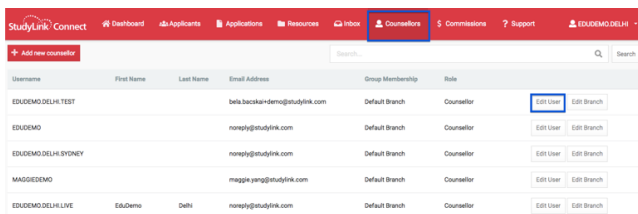
3. Enter the Counsellor's personal details
4. Enter the Username and password, and '**Save**'.



The screenshot shows the 'Enter Counsellor Details' form. It is divided into two sections: 'Personal Details' and 'Account Details'. The 'Personal Details' section includes fields for 'First name', 'Last name', and 'Email *'. The 'Account Details' section includes fields for 'Username *', 'Password *', and 'Password confirmation *'. A red 'Save' button is located at the bottom left of the form.

Manage Counsellor details

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



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

Update Counsellor Details

User Details

Username*
DONNA_WILKINSONTEST

Required: 150 characters or fewer: Letters, digits and @/./_/-/, only.

First name
Donna

Last name
Wilkinson

Email*
donna.wilkinson@studylink.com

Active
To disable user uncheck box. User will not be able to login

Change a Counsellor's role

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

Username	First Name	Last Name	Email Address	Group Membership	Role	
EDUDEMO.DELHI.TEST			bela.bacsikai+demo@studylink.com	Default Branch	Counsellor	Edit User Edit Branch
EDUDEMO			noreply@studylink.com	Default Branch	Counsellor	Edit User Edit Branch
EDUDEMO.DELHI.SYDNEY			noreply@studylink.com	Default Branch	Counsellor	Edit User Edit Branch
MAGGIEDEMO			maggie.yang@studylink.com	Default Branch	Counsellor	Edit User Edit Branch
EDUDEMO.DELHI.LIVE	EduDemo	Delhi	noreply@studylink.com	Default Branch	Counsellor	Edit User Edit Branch

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**'

Username	First Name	Last Name	Email Address	Group Membership	Role	
EDUDEMO.DELHI.TEST			bela.bacsikai+demo@studylink.com	Default Branch	Counsellor	Edit User Edit Branch
EDUDEMO			noreply@studylink.com	Default Branch	Counsellor	Edit User Edit Branch
EDUDEMO.DELHI.SYDNEY			noreply@studylink.com	Default Branch	Counsellor	Edit User Edit Branch
MAGGIEDEMO			maggie.yang@studylink.com	Default Branch	Counsellor	Edit User Edit Branch
EDUDEMO.DELHI.LIVE	EduDemo	Delhi	noreply@studylink.com	Default Branch	Counsellor	Edit User Edit Branch

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

Update Counsellor Details

User Details

Username *
DONNA_WILKINSONTEST
Required. 150 characters or fewer. Letters, digits and @/./+/-/_ only.

First name
Donna

Last name
Wilkinson

Email *
donna.wilkinson@studylink.com

Active
To disable user uncheck box. User will not be able to login