

# **College Partner Portal**

**User Guide** 



3663	SERVICES E-MATERIALS		io College Application Service PARTNER PORTAL ADJUST FONT STATES
Quick Links ontariocolleges.ca College Contact List	PARTNER PORTAL LOGIN	ns including	Erancais Contact Us For Staff Tel: 1.888.892.2228
Ontario School Counsellors' Association - OSCA	Applicant Search, Manage Programs, Grade File U eTMS.	Login at: www.oc Click on ' <b>PARTNE</b> then the green 'L	R PORTAL' and

# Login (cont'd)

	ONTAR: COLLEG		? Have a question? HELP
			Login using the username and password provided in the Partner Portal registration email.
	Log On		Note: Log in information is CaSe SensitiVe.
with the	User Name: Y Password:	ou finish working with og off from the site.	I Follow password criteria when creating a new password. (No previously used password accepted.) In this site do one of the following: In t
		for authorized users only. cess problems contact the <u>site</u>	administrator. Uppercase letter, Lowercase letter
	© 2014	ONTARIO COLLEG	<ul> <li>Number</li> <li>Special character (Example: ! \$ # %)</li> <li>No part of your First Name, Last Name or Username</li> </ul>

# Home (default) Screen

PARTNER\fans.meehan	Edit Access Account   Search Applicants   Sy	vstem Applicant Search   Manage	Program Cycles   Search Programs   Search Offers   College Information   Document Access   eTMS
ONTARIO Colleges	.CA		
Applican	it Search		Click on the menu bar to access the
Application Number	: Account Number:		functions to which you have been granted access.
First Name:	Last Name:		Note: Not all users may have access to all portal functionality.
Mident Code	Email:	Application Cycle	
Hore Search Opt	tions		
Search			
Contact Us Privacy Stat	ement Terms of Use FAQ		
© 2014 ONT	ARIO COLLEGE APPLICATION SERVICE		

# Home (default) Screen (cont'd)

PARTNER\fans.meehan | Edit Access Account | Search Applicants | System Applicant Search | Manage Program Cycles | Search Programs | Search Offers | College Information | Document Access | eTMS

#### ONTARIO COLLEGES .CA

Edit Access Account – used to change password.

**Search Applicants** – Home (default) screen. Allows you to view applicants to your college.

**System Applicant Search** – Allows you to list all applicants that have applied to all colleges.

Manage Program Cycles – Select an application cycle to display and manage your college's program offerings.

**Search Programs** – Search and manage a specific program offering.

**Search Offers** – View applicants who have received offer to your college only.

**College Information** – Information displayed to the applicant during the offer process.

**Document Access** – Access to application supporting documents.

**eTMS** – Access to the Electronic Transcript Management System.

# **Change Password**

PARTNERVfans.meehar   Edit Access Account ONTARIO COLLEGES .CA Click 'Edit Access Account the 'Change Password COLLEGES .CA	unt' to access	anage Program Cycles   Search Programs   Search Offers   College Information   Document Access   eTMS Logout
Rtfans.meehan         Change Password       Home         Welcome to ontarioc         Contact Us       by Statement         Terms of Use       FAQ         IONTARIO COLLEGE APPLICATION SERVICE	Change Password	Change Password Description *Current Password: Minimum Password Requiremen Minimum 8 Characters and Maxi 1 Uppercase Letter 1 Lowercase Letter 1 Lowercase Letter 1 Number 1 Symbol (e.g. @, #, \$) Portal Password Criteria: Minimum of 8, maximum of 14 characters Uppercase letter, Lowercase letter Number Special character (Example: 1 \$ # %) No part of your First Name, Last Name or Username
		*Confirm New Password: Change Password

# **Search Applicants Screen**

To locate applicants to YOUR college.

ONTARIO COLLEGES .CA			
Applicant S Application Number: First Name:	Account Number:	appli resu	e the default "All" to see all
Mident Code	Email:	Application Cycle	
More Search Options  Search Clear  Contact Us Privacy Statement	Terms of Use FAQ		Enter search criteria in at least one field (e.g. partial student name) and click ' <b>Search</b> ' to locate an applicant record.
Click the ' <b>+</b> additional s fields.	' to view search criteria		Note: 'String search' is used (e.g. entering 'tes' will result in any record containing the 'tes' characters).

# **Search Applicants Results**

Last Name 👔						-		
	First Name	Application Number	Application Status	Account Number	Account Status	<u>DOB</u>	Previous Last Name	Activa
Tester	Tom	14-032-6506	Paid	210029503788	Active	1996/03/30		
Testfarrelly	Erin	11-246-3991	Unpaid	210017836791	Active	1988/02/20		
Testfarrellyone	Erin	11-247-3513	Unpaid	210017842335	Active	1968/01/27		
Testoctsix	Erin	15-003-2637	Unpaid	210031377759	Active	1974/01/24		
TESTON	ELIZABETH	10-036-6704	Paid	210010617927	Active	1989/02/02		
testten	sam	14-214-2787	Pending Payment	210031100739	Active	1986/05/05		
upgradetest	crm	14-225-9346	Pending Payment	210031225065	Active	1997/01/02		
upgradetesttwo	crm	14-225-9382	Pending Payment	210031225083	Active	1997/03/03		

Click on any column heading hyperlink to reorder the records in either ascending (default) or descending (optional) order.

Note: If only one record matches search criteria, you will be taken directly to that applicant's dashboard.

# **Applicant Dashboard**

PARTNER\fans.meehan   Edit Access Accour	View all applicant information relating to your college from the applicant Dashboard screen (see exceptions noted below).
ONTARIO Colleges .ca	<b>Personal Information</b> – basic demographic info, including <u>legal name</u> , date of birth, etc.
Nu College Applicant   Account Number:21	<b>Contact Information</b> – applicant street address, email address, telephone numbers
My Home	(college user may update)
My Profile	Authorized Users – not available for view
Personal Information     Contact Information	
<ul> <li>Contact Information</li> <li>Authorized Users</li> </ul>	<b>Citizenship &amp; Residency</b> – Citizenship, residency status in Canada, country of birth
Citizenship and Residency	(college user may update)
✓ Education	Education – high school, postsecondary or international education information
Financial Support	Financial Support – agency sponsorship; this does not include OSAP
Experience	agency sponsorship, this does not include OSA
My Applications	<b>Experience</b> – area of study-related employment or volunteer experience, test scores
15-001-0101 - Aug 2015 - Jul 2016	Program Choices – programs selected at your college by applicant
Program Choices (1)	
Basis of Admission	Basis of Admission – confirmation of high school attendance or graduation
Payment Summary	Transcript Request – high school and/or college transcript requests via eTMS
View Offers (0)	
	Payment summary – not available for view
	View Offers – not available for view

#### **Email Communications** (not available for view)

#### ONTARIO Colleges .ca

With the introduction of **Canadian Anti-Spam Legislation (CASL)** on July 1, 2014, we are now required to collect consent from applicants in order to send commercial emails.

#### Email Communications

If you would like to receive email from ontariocolleges.ca and Ontario's Colleges about surveys, promotions and program offerings, please check the boxes below:

- I agree to receive electronic messages from ontariocolleges.ca (OCAS Application Services, Inc.) including invitations to participate in surveys, contests, special promotions, and newsletters. I may withdraw my consent at any time.
- I am interested in receiving more information from the College(s) which I select as choices in my application. Each College I select may send me an initial electronic message, requesting my consent to receive future electronic messages from the College, which may be commercial or promotional in nature. I give permission for OCAS Applications Services, Inc., to provide the applicable College(s) with my email address, so that the College(s) can send me this message.

Submit

**On first login only**, applicants are presented with this Email Communications page, containing two options for receiving commercial emails.

The first option collects consent for ontariocolleges.ca to send commercial emails. The second collects permission to establish a one-time referral between the applicant and their college choices, which allows the colleges to reach out and collect their own consent.

Both of these boxes are optional. Once applicants have selected their options (or chosen not to), they can click '**Submit**' to proceed to their application. They will not see this page again and will be unable to opt in to commercial emails at a later time. However, it is always possible to unsubscribe from commercial emails using a link in the email's footer or calling our Customer Contact Centre.

Regardless of preferences for commercial communications, applicants will receive transactional emails relating to their application activity, such as payment notifications, password resets, etc.

# **System Applicant Search**

To locate applicants who have applied **to ANY college**.

System App	olicant Search	
The System Applicant Search		ants who have applied to any of the colleges using a variety of search criteria.
Application Number: First Name:	Account Number:	Enter search criteria (e.g. partial student name) and click ' <b>Search</b> ' to locate an applicant who has <b>applied to any college</b> .
More Search Options     Search     Clear		Note: 'String search' is used (e.g. entering 'tes' will result in any record containing the 'tes' characters).

### **System Applicant Search Results**

More Search (     Search Clea	·			by last nam Click on any	e. ⁄ <b>column hea</b>	ding hyp	ed alphabeticall <b>Perlink</b> to reord
Last Name	<u>First Name</u>	Application Number	Application Status		in either asc (optional) or	0 (	default) or
applicant	jo	11-244-0384	Unpaid	210015018792	Active	1986/07/21	
applicant	jo	12-002-4603	Unpaid	210015018792	Active	1986/07/21	
Applicant	Test	12-056-0922	Unpaid	210020584275	Active	1992/12/01	
Applicant	Nu College	15-001-0101	Pending Payment	210031336314	Active	1997/02/02	
Applicantest	Create			210030978465	Active	1978/09/03	
Applicanttest	Create	14-025-1833	Unpaid	210029342652	Active	1981/01/01	
College-Applicant	Nu	14-003-5977	Unpaid	210027161259	Active	1986/01/01	
College-Applicant	Nouveau	14-003-6661	Pending Payment	210027185703	Active	1986/01/01	
OCAS APPLICANTÉ	TEST EIGHT	11-023-6833	Unpaid	210006759942	Active	1990/01/01	

Results are VIEW ONLY and are used only to identify if an individual has an existing application on file at ontariocolleges.ca/OCAS.

# **System Applicant Search Results** (cont'd)

Last Name	First Name	Applica	Application Status	Account Number	Account Status	DOB	Previous Last Name
applicant	jo	1/ 084	Unpaid	210015018792	Active	1986/07/21	
applicant	jo	002-4603	Unpaid	210015018792	Active	1986/07/21	
Applicant	Test	12-056-0922	Unpaid	210020584275	Active	1992/12/01	
Applicant	Nu College	15-001-0101	Pending Payment	210031336314	Active	1997/02/02	
Applicantest	Create			210030978465	Active	1978/09/03	
Applicanttest	Create	14-025-1833	Unpaid	210029342652	Active	1981/01/01	
College-Applicant	Nu	003-5977	Unpaid	210027161259	Active	1986/01/01	

**Pending Payment** – application is not active; check with OCAS as to the required fees to be paid

# **Updating Program Offerings**

The 'Manage Program Cycles' and 'Search Programs' menu options provide similar functionality.

Both can be used to update program offerings at your college.

Program offering information can be updated based on established business rules.

Whenever a change is made to an **application cycle**, **program code**, **campus code** or **start date**, it is considered a new program addition.

# Manage Program Cycles

Display all of your college's program offerings.

PARTNER\fans.meehan   Edit Access Account   Search Applicants   System Applicant Search   Manage	e Program Cycles Search Programs   Search Offers   College Information   Document Ar	ccess Logout
COLLEGES .CA	Application Cycle:         College:           2015 (2015/08/01 to 2016/07/31)         Fanshawe	
Manage Program	Campus:	
Fanshawe	Program Code:	
Program Cycle         Date Range         Status           Fanshawe 2015         2015/08/01 to 2016/07/31         Published           Fanshawe 2014         2014/08/01 to 2015/07/31         Published	Program Title:	
Pages:   <first 1="" <previous="" next=""> Last&gt;  Showing 20 Items per Page. Page 1 of 1, Items 1 - 2 of 2</first>	Search Clear Add New Program	
Click on a <b>program cycle hyperlink</b> to display all your college programs	Program Code Program Title	<u>Campus</u>
within a published application cycle.		Clinton Kincardine Off Site
	ADP2 ADVANCED CARE PARAMEDIC L	London
Programs as displayed in alpha		London
order of program title. Click on any of the <b>column heading hyperlinks</b> to resort.	ANA1 ATY1 Pages:   <f Export program information to Excel: Program Code, Program Title, College,</f 	Campus
	Showing 20 Items per Page. P ge 1 of 11, Items 1 - 20 of 201	
	Export to Excel 3	

# Manage Program Cycles – Search / Add New

Sear	ch Progr	ams				
Application 2015 (2015/	Cycle: 08/01 to 2016/07/31)		lege: Ishawe			
Campus:	v ode:	Code / Progr results <b>OR</b> cl	pus pick list and/or am Title fields to re ick on any program view program deta	efine search code/title		
Program Tit						
Search	Clear Add New	Program	Click on ' <b>Add Nev</b> offering to the se	•		am
ECE1C	EARLY CHILDHOO	D EDD ON	Note: A new prog	ram can or	nly be added fro	ст
MIM2	MECHANICAL ENG	SINEERING TES	this screen. (New		, ,	
ADP2	ADVANCED CARE	PARAMEDIC	can be added fror	-		
AFM1	ADVANCED FILMN	IAKING	Cycles and Search	n Program i	menu options.)	
APS1	ADVANCED POLIC	E STUDIES	L	London		
ANA1	ANESTHESIA ASS	ISTANT		London		

### Manage Programs – Add New / Edit

* College: Fanshawe Program Details:	* Campus:	~	Use the pick lists a	nu ne
			fields to add progra	am de
**				
* Program Code:	* Program Title:			
* Program Type:	* Promotion:			
Select	Standard Use	✓		
* Length:	* Adult Training:			
	Not Adult Training	~		
* Duration:	Special Code:			
Select	Select	~		
* Credential:	* APS Number:			
Select		_		
* Entry Level:	* Study Area:		If the MCU Code is no	ot
Select	Select	~	known or to view a lis	st of a
* Highly Competitive:	* Language:	1	available MCU codes,	use t
Select	Select	~	'Find' function.	

### Manage Programs – Add New / Edit (cont'd)

* Category:		
Select	$\checkmark$	
* Sub-Category:		Program categories are use in 'Find a Program' search
Select	$\checkmark$	results. (1 main category and
Category:		1 sub-category is mandatory
Select		
Sub-Category:		
Select	$\checkmark$	
* Program Sta	ort Date:	
r rogram Ota	art Date.	
Add Program Start Date	Click	<b>'Save</b> ' when complete
	CIICK	Save when complete

### Manage Programs – Add Program Start Date



### Manage Programs – **Program Availability**



**Open** – Applications are considered for admission. (Seats available.)

**Closed** – Applications are not considered for admission. (Program is full for that specific start date.)

Waitlisted – Applications will still be processed. (Seats may still become available.)

#### **Program Availability Updates**

Changes are reflected immediately within the Partner Portal and within an hour (approximately) in the online Find a Program utility.

### Manage Programs – Program Status

Start Date	Availability	Status	E Enrolment	Expiry Date	Expiry Action	Action
2015 - Sep 🗸 Add Program S		Active Inactive Cancelled Suspended	25	2014/10/30	Closed 💌	Delete
Save	Clone Program		. /	)		

#### **Program Status**

Active – Normal processing of applications to the program.

**Inactive** – Program was put on system but is no longer being offered and cannot be deleted because applications are attached to it.

**Cancelled** – Program may not be offered again during the application cycle. Applications received to this program are transmitted to the college.

**Suspended** – Program is not currently offered, but may be in future (including this application cycle).

### Manage Programs – Expiry Date & Expiry Action

	Availability	Status	Enrolment En en Estimat	Expiry Date	Expiry Action	Action
2015 - Sep 🗸	Open 🔽	Active 🔽		2014/10/30	Closed WaitListed	Delete
Save Clear	Clone Program	Expiry				
		Expiry Expiry	Date – Date that	the program ava	ailability will	be set

#### Manage Programs – Action

Start Date	Availability	Status	Enrolment Estimate	Enrolment Maximum	Expiry Date	Expire	Action
2015 - Sep 🗸	Open 🗸	Active 🗸	15	0	2015/09/25	losed 🗸	Delete View Applicants

#### Action

**Delete** – Click '**Delete**' hyperlink to remove a specific start date. Start date will only be removed after the 'Save' button is clicked. A program start date can only be deleted if no applicants have applied.

**View Applicants** – Click on '**View Applicants**' to list all applicants that have applied to the specific program start date.

### Manage Programs – Save / Clear / Clone

Start Date	Availability	Status	Enrolment Estimate	Enrolment Maximum	Expiry Date	E	Expiry Act	ion	Action
2015 - Sep 🔽	Open 🗸	Active 🔽	15	0	2015/09/25		Closed	~	Delete View Applicants
Add Program Sta	art Date								
	Clone Program		,						
			)						
Save	Clone Program	ion. Actions pro	ogram sta	rt date de	elete.				
Save Clear	Clone Program		ogram sta	rt date de	elete.				

# **Search Programs**

Search for a **specific program offering at your college**. (similar functionality to the 'Manage Program Cycles' menu option)

PARTNER\fans.meehan   Edit Access Account   Search Ap	plicants   System Applicant Search   Manage Program Cycles	Search Programs	Search Offers   College Information	Document Access
ONTARIO				
COLLEGES .CA				
Program Search				
College: Fanshawe				
Application Cycle:				
Be sure to se				
	cation cycle.			
Start Date:				
All				
Campus:				
All	Enter specific search criteria			
Program Code:	-			
Program Code:	to locate a specific program.			
	0.5			
Program Title:	OR			
	dial ( <b>Caarab</b> ' to display all			
	click ' <b>Search</b> ' to display all			
Search Clear	program offerings.			

#### **Search Offers**

0 1 0 11			
Search Offers			
Search			
Application Number:	Program Code:		
Last Name:	First Name:		
	Search Offers		
Date of Birth:	∃ Search		
Year 🗸 Month 🔽 Day 🗸			
Search Clear	Application Number: 14-032-6506 Date of Birth: 1996/03/30	Name: Tester Tom	Account #: 210029503788
	Program Title:	Program Code: CTN2	Campus: London
	COMPUTER SYSTEMS TECHNICIAN	Start Date: 2014/09	Entry Level: Entry Level 1
	Full / Part Time: Full Time	Sequence Number: 3	Term Identifier: FA14
Enter the englighting	Offer State: Active	Confirmation Status: Declined	Date Offer Posted: 2014/02/01
Enter the application number and click	Confirmed Date:	Soft Expiry Date: 2014/05/01	Late Admit: No
number and click	Hard Expiry Date: 2014/08/01	Edit Offer 🔹	

# **Update Offer**

Update Offer			
Application Number:	Name:	College:	
14-032-6506	Tester, Tom	Fanshawe	
Date of Birth:			
30/03/1996			
Confirmation Status:		-	ndividual offers as required. Click
Declined			ed making updates or 'Cancel' to
Offer State:		exit without saving	g changes.
Active			
Sequence Number:	Entry Level:		ass updates should be sent to
3	Entry Level 1	OCAS in the next o	offer file.
Date Offer Posted:	Program Code:	To prevent confirm	nation of an offer file, update the
2014/02/01	CTN2	hard expiry date to	o the current date to expire the
		offer.	
Soft Expiry Date:	Campus Code:		
2014/05/01	LC	To change a progra	am code, campus code, program
			ince status or entry level, revoke
Hard Expiry Date:	Start Date:		and insert the new offer in the next
2014/08/01	2014 - Sep	OCAS offer file.	ind insert the new oner in the next
		OCAS offer file.	
Late Admit:	Full / Part Time:		
No			
Term Identifier:			
FA14			
Save Cancel			

# **Update Offer** (cont'd)

Update Offer			
Application Number: 14-032-6506	Name: Tester, Tom	College: Fanshawe	
Date of Birth: 30/03/1996		Confirmation Status	
Confirmation Status: Declined		No Response – No offers proc	cessed for applicant.
Offer State: Active		<b>CCY</b> – Applicant has confirme cannot be deleted.	ed to this offer. Confirmed offers
Sequence Number:	Entry Level:		
3	Entry Level 1	<b>CCN</b> – Applicant has confirme	ed another offer or declined all offers
Date Offer Posted:	Program Code:	Offer State	
2014/02/01	CTN2		vailable for the applicant to select.
Soft Expiry Date: 2014/05/01	Campus Code: LC	<b>Deleted</b> – Offer deleted by co cannot view or select.	ollege (e.g. issued in error); applicant
Hard Expiry Date:	Start Date: 2014 - Sep		awn by college, viewable by applicant Ilid offer made to applicant who has
Late Admit:	Full / Part Time:	not satisfied the conditions o	
Term Identifier:		Program Suspended – Offer v	withdrawn by college due to program
FA14			t cannot be selected by applicant.

# **Update Offer** (cont'd)

Update Offer		
Application Number:		Name:
14-032-6506		Tester, Ton
Date of Birth:		
30/03/1996		
Confirmation Status:		
Declined		
Offer State:		
Active	~	
Sequence Number:		Entry Leve
3	~	Entry Level
Date Offer Posted:		Program C
2014/02/01		CTN2
Soft Expiry Date:		Campus C
2014/05/01		LC
Hard Expiry Date:		Start Date:
2014/08/01		2014 - Sep
Late Admit:		Full / Part
No	~	
Term Identifier:		
FA14		

**Sequence Number** – Sequence number of the offer.

**Date Offer Posted** – Field contains OFFER\_ACTIVE\_DATE from the offer file. Date must be prior to the soft and hard expiry dates. Offer becomes active and visible to the application at 12:01 a.m. on the date specified.

**Soft Expiry Date** – Field contains OFFER\_EXPIRY\_DATE\_ SOFT from the offer file. Date can be the same or prior to the hard expiry date. Soft expiry dates are viewable by applicant as 'Date of Expiry' for that offer. Applicants are able to select offers beyond the soft expiry date.

**Hard Expiry Date** – Field contains OFFER\_EXPIRY\_DATE\_HARD from the offer file. Applicants are not able to select offers beyond the hard expiry date. Offers expire at 11:59 p.m. on the date specified.

#### Late Admit –

NO: indicates regular offer

YES: indicates a late admit offer. OCAS will identify this offer as a late admit and will hold it until the OCAS application has been received and processed.

**Term Identifier** – Term for which offer is being made. (FA = Fall / WI = Winter / SU = Spring/Summer)

# **College Information**

PARTNER\fans.meehan | Edit Access Account | Search Applicants | System Applicant Search | Manage Program Cycles | Search Programs | Search Offen | College Information | Docur

Document Access Logout

College Information
College mornation
* Revoked Info URL
http://www.revokedofferurl.com
* Suspended Info URL
http://www.suspendedofferurl.com
* Phone Number for Revoked Offers 519 5551234
* College Website URL
http://www.yourcollegewebsite.ca
* Audit Report Email Address someone@yourcollege.ca; other@yourcolleg
Welcome Message (HTML text accepted - eg: = inline break)
<corpsciences of="" second="" second<="" td="" the=""></corpsciences>
Over the next few months, we will send you important information about your admission, your program, starting college and more. Don't
Preview Message
College Logo:
YOUR LOGO HERE
Save Clear

ONTARIO

Displays the functionality to update information that is displayed to the applicant during the offer process. Click **'Save'** when finished making updates or **'Clear'** to exit without saving changes.

**Revoked Info URL** – URL link for applicant if the offer is revoked.

**Suspended Info URL** – URL link for applicant if the offer is suspended.

**Phone Number for Revoked Offers** – Phone number for applicant to contact college if offer is revoked or suspended.

**College Website URL** – URL link to college website.

**Audit Report Email Address** – Email address for receipt of audit reports. Separate individual email addresses by a comma.

**Welcome Message** – Message for applicant after offer of admission is accepted.

**College Logo** – College logo displayed to applicants. Changes to college logos must be submitted to OCAS. (.gif files, 100 x 100 px, 72 dpi)

#### **Document Access**





