Portal Guide for Agents
January 2018
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## Introduction

This document is designed to support you in registering on and using the University of Leeds agent portal. Each step is illustrated with screenshots (images) from the portal and will cover:

- Registering your own profile
- Changing email or password details
- Creating an applicant (client) record
- Completing and submitting an application for study on behalf of an applicant
- Booking an interview
- Receiving and responding to an offer of a place
- Unsuccessful applications
- Summer pre-sessional applications
- Paying the tuition fee deposit or providing appropriate exemption evidence
- Receiving a CAS
- Receiving and responding to a message from the University requesting information and/or documents
- Sending an enquiry to the University
- General tips for understanding and using the portal

All screenshots have been taken from a test environment as close as possible to the live system. However, there may be some slight changes as the portal evolves.

> As you go through the guide, you will find key points highlighted in yellow like this.

If you have any queries about any of the information in this guide, please contact agentenquiries@leeds.ac.uk.
### Accessing the portal

### Registering your profile

You will have been sent an email with an invitation code, which you will need to redeem within two weeks in order to register on the portal.

Click on the link **Click here to complete registration**.

- If you have not received an invitation code or it has expired, contact agentenquiries@leeds.ac.uk.

You will be taken to the registration page, with your invitation code already entered. Press **Submit**.
The next screen requires you to complete your details. Your name and email address will already display – check that they are correct and re-enter your email address to confirm.

Create a password and re-enter it to confirm.

- **Your password must be a minimum of 8 characters and contain at least 2 special characters, e.g. +$&=@**

Type your date of birth in the format DD/MM/YYYY, or select it using the calendar button.

Choose a security question and enter your answer.

- **Fields that have * at the side are mandatory and must be completed before you can move on.**
Once your details are complete, you will need to complete a security check.

Type the numbers or text as they appear in the image.

If you find the text difficult to see you can press the recycle button to view a new image. You are also able to listen to the text by pressing the sound icon.

Click Register.

You will be taken to the agent portal homepage.

You have now registered.
After you have registered, each subsequent time that you want to access the portal you just need to log in with your email address and password. You do not need to use an invitation code.

Open your internet browser and enter the following address: https://application.leeds.ac.uk.

This will take you to the Sign In page.

Enter your email address and password.

⇒ If you cannot remember your password, click on Forgot Your Password? You will be asked to answer the security question you chose when you registered. We will then send you an email with a new password.

Complete the security check then press Sign in.
The **agent portal homepage** will appear.

You are now able to use the portal to create and submit applications on behalf of your applicants (clients).
You can update your profile information and change your password or email address in the agent portal.

Click on your name in the top right corner then select the appropriate option:

- Profile
- Change Password
- Change Email Address
If you select **Profile**, on the first page you can update any of your personal details, including your name and telephone contact details.

Press **Next** to continue.
On the second page you can update your address details.

Press **Finish** to save your changes and return to the portal homepage.
If you select **Change Password**, you will be asked to enter your current password for verification, then choose and confirm a new password.

Press **Change Password** to save your change.

If you select **Change Email Address**, you will be asked to choose and confirm a new email address, then enter your password for verification.

Press **Change Email** to save your change.
If you need to make any changes to:

- Your main agency details
- Your branch office details
- Your representative details (including removing access for an existing user)

Submitting an application

Creating an applicant (client) record

➤ Before you can submit an application on behalf of an applicant you need to create a profile for them in the portal, containing all of their personal details.

➤ This is called an Applicant record. You will then be able to use this record to create and submit an application.

From the portal home screen click on Applicants and Create New Applicant.
You will be taken to the **Agent Applicant** screen.

Complete all the applicant’s details and press **Save**.

- **Fields that have * at the side are mandatory and must be completed before you can move on.**

- **The name fields must match the applicant’s passport. Last name = family name/surname.**

- **You must provide the applicant’s personal email address.** You cannot use an agent email address for Applicant records as it must be unique to the applicant. We will automatically send emails about any applications to both you and the applicant.

You have now registered your applicant on the application system.

The applicant will receive an email advising them that an account has been created on their behalf and inviting them to set up a password to complete registration – this is the same process as when you registered for your account. They will then be able to log into the applicant portal and view the progress of their application.

- **The applicant will be able to see the same information and take the same actions as you in the portal.**

Changes to an applicant’s personal information can only be made by the applicant in their own portal or by contacting the University.
On the agent portal homepage, click on **Applicants** then search for the relevant applicant.

Unfortunately it is not possible to search by an applicant’s first and last name together so, for example, to find an applicant named Xin Chang you must search either Xin or *Chang. (The symbol * is called a wildcard. It enables the system to find any applicant with the search term at the end of their name.)

Alternatively, you can search by email address.

*(For further guidance on searching in the portal, see pages 78 to 79.)*

Click on the applicant’s **first name** to go to the applicant homepage.

➔ If you have just created a new Applicant record, you will not need to do this step – once you save the new applicant’s details you will automatically be taken to the applicant portal homepage.
Scroll below the personal information to the additional options. Select **Applications** then **Create New Application**.

This will take you to the application form, which will ask you to choose the course for which the applicant wishes to apply.

For **Study Type** choose **Masters (Taught Postgraduate)**.

The **Mode of Attendance** will usually be **Full Time**.
For the **Programme Title**, enter the first 3 letters of the course title (as a minimum). The system will return several options.

Click **Open** to see information about the course or **Select** to add it to the application.
The **Academic Year of Entry** and **Start Date** fields will then be filled automatically.

Press **Next**.

You will now be able to complete the rest of the application.

- You can save the application to come back to it at a later time by pressing **Save & Return**.

- To resume a saved draft application, search for the applicant in the **Applications** section of the agent portal homepage. The application will now display – click on it to continue with the form. *(For guidance on searching in the portal, see pages 78 to 79.)*

- You must complete and submit the draft application within 180 days. After that time, it will no longer display in the portal.
You will now see a list of section headers on the left hand side of the application. Each section has a red bar at the side. As you complete each section the bar will turn green.

You will not be able to submit the application until all mandatory fields and sections have been completed (i.e. turned green). You can check which sections are mandatory in the Application Checklist.

### Section 1 – Programme of Study

This is already populated with the course information from the previous page, so you can simply press **Next** to move on to the next section.

### Section 2 – Personal Details

This is already populated with the information from the applicant’s profile, so you can simply press **Next** to move on to the next section.

### Section 3 – Address Details

This is already populated with the information from the applicant’s profile, so you can simply press **Next** to move on to the next section.
Section 4 – Academic Qualifications

This is where you will need to add the applicant’s bachelor degree, plus any other postgraduate degrees they may have taken or be taking.

➔ Before applying, we advise that you check the international equivalent qualifications and, if applicable, approved Chinese institution lists at www.leeds.ac.uk/site/custom_scripts/admissions_qualifications.php. If the applicant does not meet our entry requirements or has studied at a Chinese institution with a low ranking, unfortunately it is unlikely that their application will be successful.

Click on Add New Academic Qualification.
Enter the country and institution of study and the qualification level, title and start date.
The next question is **Have you completed the course?**

Depending on the answer you give, the application form will ask for different information. Although these fields are not mandatory, they will help the admissions team to assess the application.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

If you answer **Yes** you will be asked to enter the completion date and confirm the results, if known.

If you answer **No** you will be asked to enter the predicted (expected) result and completion date.
At the bottom of the page, you are asked to upload supporting documents.

➤ If the applicant has completed the degree, upload all final documentation including transcripts, certificates and official translations into English (if applicable).

➤ If the applicant is still studying, upload interim (partial) transcripts and official translations into English (if applicable).

Please wait until you have all of the required documents before submitting an application, as it cannot be assessed without them.

Click on **Browse** to search for the document you wish to upload. Once uploaded, it will display in the application form.

Repeat for each document.

When you have finished, press **Save**.

You will return to the main Academic Qualifications screen, where you will see the qualification that you have just added.

If you need to add another qualification, repeat the above steps. If not, press **Next** to continue.
Section 5 – English Language Proficiency

This is where you will need to add the applicant’s English language qualification, including where this has not met the entry requirement. This way, we can use the qualification to assess the applicant’s eligibility for a summer pre-sessional English course at our Language Centre.

 עוסק All applicants must complete this section, including those who have not yet met the language requirement or taken an English test. It is not possible to leave this section blank.

Click on Add New English Language Proficiency.
If the applicant already has proof of English proficiency, select the appropriate qualification type (e.g. IELTS).

Enter the completion date, reference number and result.

Upload the English certificate using the Browse button at the bottom of the page.

➔ If the applicant has taken a test but not yet met the requirements, do still provide the results and certificate. This will help the admissions team to assess the application and check whether the applicant may be eligible for a summer pre-sessional.

Press Save.
If the applicant has not yet taken an English test, select the qualification type No English Language Qualification.

Press Save.

You will return to the main English Language Proficiency screen, where you will see the qualification that you have just added.

If you need to add another qualification, repeat the above steps. If not, press Next to continue.
Section 6 – Professional Qualifications

This is where you can add information about any qualifications held by the applicant that were awarded by a professional body.

⇒ This section may not appear in the application form for all courses as some departments do not need this information.

Click on Add New Professional Qualification.
Complete the qualification details and upload any evidence using the Browse button.

Press Save.

You will return to the main Professional Qualifications screen, where you will see the qualification that you have just added.

If you need to add another qualification, repeat the above steps. If not, press Next to continue.
Section 7 – Work Experience

This is where you can add information about an applicant’s previous work experience and upload a CV.

This section may not appear in the application form for all courses as some departments do not require applicants to have undertaken any work experience before applying or to provide a CV.

Click on Add New Work Experience.
Complete the form and, if appropriate, upload evidence (e.g., an internship certificate or CV) using the Browse button.

Press Save.

You will return to the main Work Experience screen, where you will see the record that you have just added.

If you need to add another example of work experience, repeat the above steps. If not, press Next to continue.
Section 8 – Affiliations, Publications and Prizes

This is where you can provide information about any works the applicant may have had published or any prizes they may have won.

This section may not appear in the application form for all courses as some departments do not require applicants to provide this information.

Click on Add New Affiliation, Publication or Prize.
Choose the appropriate option from the drop-down list.

You will then need to fill in the required information – the fields will vary according to the type you selected.
If you select Prize, you will need to add the award name. You can also add a description, date and URL, if appropriate.

Upload any evidence using the Browse button.

Press Save.
If you select Published Article, Book or Academic Paper, provide the name of the work.

You can also add a description, the publication date or a hyperlink.

Upload any evidence using the Browse button.

Press Save.
If you select **Affiliations**, provide the required detail. Add a description, the date and the URL, if applicable.

Upload any evidence using the **Browse** button.

Press **Save**.

In each case, you will return to the main Affiliations, Publications and Prizes screen, where you will see the record that you have just added.

If you need to add another example, repeat the above steps. If not, press **Next** to continue.
Section 9 – Supporting Documentation

This is where you can provide the applicant’s personal statement and any additional documents.

➤ This section may not appear in the application form for all courses as some departments do not require applicants to provide a personal statement.

You can either type the applicant’s personal statement directly into the box (up to 4000 characters) or upload it as a document at the bottom of the page using the Browse button.

This is also the place to upload additional required documents – for example, translation tests for applications to our translation and interpreting courses.

Press Next to continue.
Section 10 – References

In this section you will need to provide contact details for at least two referees, preferably academic. If you already have a copy of a reference letter, you can upload it for consideration.

➤ This section may not appear in the application form for all courses as some departments do not require references.

➤ Requests for references are not sent to referees automatically. Instead, the admissions team will email the referees if they are interested in pursuing the applicant’s application.

Click on Add New Referee.
Complete the Referee Details form.

If you already have the reference, upload it using the Browse button. Ideally it should be a PDF file – we cannot normally consider references saved as a Word document.

Press Save.

➔ Please provide an institutional email address for each referee. Unfortunately we are not usually able to accept a personal email address.

You will return to the main References screen, where you will see the referee that you have just added. To add another referee, repeat the above steps.

Once all the referees have been added, press Next to continue.
Section 11 – Funding

We ask all applicants to indicate how they intend to fund their studies.

⇒ It is fine if the applicant later changes the way they will be funding their studies – they will be asked to confirm this after accepting an unconditional offer.

Select the most appropriate option:

⇒ Self-Funded: the applicant is paying all of their own fees (including funding from family or friends)
⇒ Funded: the applicant will receive full funding e.g. from a scholarship or a sponsor, such as a government or employer
⇒ Partially Funded: the applicant will receive funding for some of their fees and will pay the remainder themselves
⇒ Seeking Funding: the applicant hopes to obtain funding but has not yet applied and/or received confirmation.

If the applicant will be (or hopes to be) receiving funding, provide details in the box underneath.

If they have a final letter of award, upload it at the bottom of the page using the Browse button.

Press Next.
Section 12 – Additional Support

Use this section to let us know if the applicant needs any additional support – for example, help with a disability.

Tick the appropriate option to confirm whether the applicant considers themselves disabled.

Check whether any of our widening participation criteria apply and tick any relevant boxes – leave them blank if none apply.

Press Next to continue.
Section 13 – Criminal Convictions

All applicants are required to declare any unspent criminal convictions. **Please complete this section carefully.**

Select the appropriate option then press **Next** to continue.
Section 14 – Application Checklist

The Application Checklist will show you the status of the application form.

➔ You will not be able to move onto the last section (Applicant Declaration) to submit the application if any of the mandatory sections have not been completed.

All completed sections have a tick at the side and will also show in green at the left side of the page.

All of the mandatory sections must be ticked before you can proceed. If any are not ticked, the Next button will be greyed out so you will not be able to select it. You will need to return to the section(s) without a tick and complete the missing field(s).

The additional sections are optional.

➔ The sections that are mandatory and optional will vary between courses.

Once all sections are complete, press Next to continue.
Section 15 – Applicant Declaration

This is the final section of the application form.

Tick the box to confirm that the applicant is allowing the University to collect and process their information. You will not be able to submit the application if this step is missed.

Press Submit to complete the application and send it to the course admissions team for consideration.
You will see a message confirming that the application has been submitted. You can download a copy of the application form to save and/or print, if required.

➤ You will not be given another chance to download or print the summary using the agent portal. However, the applicant will be able to do so in their own applicant portal at any time.

Once an application has been submitted it is ‘read-only’. You can no longer make any changes.

➤ The default view in the Applications section is Draft Applications. To view completed applications, click on Draft Applications and change it to Submitted Applications.
Interviews

If the admissions team wishes to interview the applicant, they will send you and the applicant an email inviting you to book an interview in the portal.

On the agent portal homepage, click on Applicants then search for the relevant applicant. Click on their first name to go to the applicant homepage.

(For guidance on searching in the portal, see pages 78 to 79.)
On the applicant homepage, open the Interviews and Events section and click on Book an Interview.

➤ You cannot access this section directly from the agent homepage – you must first have selected the applicant.

You will see all of the available timeslots for the interview. Once you have found a suitable time, click on Book.

➤ All dates and times are given in UK time.
A pop-up message will ask whether you wish to confirm the booking – click on **OK**.

You will then see a confirmation page and will also receive an email with the interview date and time.

The scheduled interview will now display in the applicant homepage under **Interviews and Events**.

➤ **You will no longer be able to click on the Book an Interview button – it will be greyed out.**
Clicking on the interview will take you to a summary page.

Once the applicant has attended the interview, it will move within the **Interviews and Events** section from **Scheduled** to **Attended**.
If the applicant receives an offer from the University, you will be notified by email.

The offer details will be shown in the **Decisions** area of the portal. Click on the application to go to the offer page.
On the offer details screen you can take the following actions:

You can accept or decline the offer.

In the My Decision field, choose either Accepted or Declined then press Submit.

➤ There is no option to defer in the Decisions section. If the applicant wishes to defer, send us a portal enquiry with the topic Start Date. Only offers that are unconditional, or conditional only on English, can be deferred. It is only possible to defer once. (For guidance on sending enquiries, see pages 73 to 75.)

You can view and download a pdf copy of the offer letter.

If the offer is unconditional, we will also post a hard copy of the letter to the applicant’s correspondence address.
You can see any **Conditions** or **Exceptions**.

Once the applicant has met the condition, click on it.

A new page will open where you can upload evidence of meeting the condition using the **Browse** button.

Press **Submit** to send the evidence to the University.

> Please wait until you have all of the required evidence (e.g. academic transcript and certificate) before responding to the condition, as you will only be able to reply once.
If the evidence is accepted, the status in the **Decisions** section will change from **Conditional - Awaiting Evidence** to **Conditional - Met**.

You can also view and respond to offer conditions in the **Messages** section – there is no difference between the two.

Once all conditions have been met, a new unconditional offer will be issued.

> **Please do not provide evidence to meet conditions in an alternative way (e.g. an email or enquiry).** Uploading it in the Decisions (or Messages) section ensures it is sent directly to the course admissions team for faster processing.

> **If you accept a conditional offer, after the conditions have been met an unconditional offer will be issued and accepted automatically – you do not need to accept it again.**

- The only exception is if you or the applicant had previously accepted more than one conditional offer as the applicant would then need to choose which unconditional offer to accept – **it is only possible to accept one unconditional offer.**
- If the applicant later changes their mind, decline the originally accepted offer and then you will be able to accept an alternative one.
Unsuccessful applications

If we are not able to offer the applicant a place on our course, we will send you and the applicant an email informing you of the decision.

You will also be able to see the outcome of the application in the Decisions section of the portal.

Click on the application to open the decision confirmation page.

You can download a copy of the unsuccessful decision letter, if you wish.

If you would like to request the reason for the unsuccessful application, you can submit a portal enquiry with the subject Feedback. *(For guidance on sending enquiries, see pages 73 to 75.)*
Summer pre-sessionals

If the applicant has taken an IELTS test but does not yet meet the requirements for their master’s course, please do still upload their IELTS certificate to the master’s application. When we consider the master’s application, we will check whether the applicant is eligible to study a summer pre-sessional to meet the English requirement for the master’s course. If the applicant is eligible, the Language Centre will contact you directly.

If we identify that the applicant is eligible to study a summer pre-sessional, the Language Centre will send you a message in the portal to ask if the applicant would like to be considered for the pre-sessional. Respond to the message to confirm whether or not the applicant would like to join the course. (For guidance on receiving and responding to messages, see pages 70 to 72.)

If the applicant would like to take the pre-sessional, the Language Centre will then process the offer. You will receive a confirmation email and will be able to view and accept the offer in the Decisions section of the portal. (For further guidance, see pages 50 to 53.)

➤ Please note that summer pre-sessional offers will start to be issued from early 2018.
If the applicant receives an offer that is conditional on English and then later obtains a language score that meets the requirements for the pre-sessional, you can:

- Either submit a pre-sessional application using the agent portal
- Or send us the new English evidence for consideration via a portal enquiry.

You can check our pre-sessional requirements at [www.leeds.ac.uk/arts/info/125008/english_language/1857/entry_requirements](http://www.leeds.ac.uk/arts/info/125008/english_language/1857/entry_requirements).

To submit a pre-sessional application using the portal:

If you submit an application in the portal directly, the process is the same as for a master’s course but for the **Study Type** you will need to select **Pre-sessional Language Course**.

For the **Mode of Attendance**, choose **Full Time**.

Press **Search**. This will bring up the summer pre-sessional courses.

Find the course with the correct length (6 or 10 weeks) and year of entry (e.g. an applicant to a master’s course starting in September 2018 will need to apply for a pre-sessional in the 2017/2018 academic year). Press **Select** to choose the course.
The **Academic Year of Entry** and **Start Date** fields will populate automatically.

Press **Next** to fill out the rest of the application so that you can submit it for consideration (*For guidance on submitting an application, see pages 14 to 45.*)

- **Ensure you upload the applicant’s recent English evidence in the English Language Proficiency section.**

Once the application has been submitted, it will be considered by the Language Centre.

If the applicant is eligible, they will receive an offer for the pre-sessional, which they will be able to view and accept in the **Decisions** section of the portal (*For further guidance, see pages 50 to 53.*)
To send us new English evidence via a portal enquiry:

Search for the applicant’s record in the Applicants section of the agent portal.

In the applicant homepage, create a new enquiry in the Enquiries section with the subject Pre-sessionals. Upload the applicant’s English certificate and send it to the University for consideration. *(For guidance on sending enquiries, see pages 73 to 75.)*

All applicants who receive an offer for a master’s course and an offer for a pre-sessional will automatically be eligible for a combined CAS.

In order to remain eligible, applicants who have academic conditions for their master’s offer will need to provide evidence that they have met these conditions by the following deadlines:

- **Friday 1 June 2018** for the ten week pre-sessional
- **Friday 29 June 2018** for the six week pre-sessional.

If the applicant cannot meet the deadline, they have the following options:

- **If the applicant holds an IELTS for UKVI**, you are welcome to contact the Language Centre to request a standalone CAS for the pre-sessional only instead.
- **If the applicant does not hold an IELTS for UKVI**, unfortunately they will not be eligible for a standalone CAS for the pre-sessional only. They will need to:
  - Either take IELTS for UKVI and meet the pre-sessional requirement by the above deadline
  - Or take IELTS (which does not have to be for UKVI) to meet the English language condition of the master’s offer directly.

The Language Centre will send information and reminders about the deadline to all summer pre-sessional offer holders who have a master’s offer with academic conditions.

- **You do not need to take any action to request a combined CAS.**
Deposits and exemption evidence

If the applicant will need a Tier 4 visa to study in the UK, after they have accepted an unconditional offer they will need to pay a £1500 tuition fee deposit or provide appropriate exemption evidence before the University can issue a CAS.

We will email you to ask you to confirm how the applicant is funding their studies by completing the Exemption Evidence Request in the Messages section.

- Do not pay the deposit until you receive an email asking you to do so (after accepting an unconditional offer).
- We strongly discourage you from paying the deposit if the applicant only holds a conditional offer. We may not be able to refund the payment if they later cannot meet the conditions to join the course.
- There is no advantage to paying early. It is not necessary to pay in order to secure a place.

On the agent portal homepage, click on Applicants then search for the relevant applicant. Click on their first name to go to the applicant homepage.

(For guidance on searching in the portal, see pages 78 to 79.)
In the applicant homepage, open the Messages section. You will now see the Exemption Evidence Request.

Click on the message subject to open it.

If the applicant is exempt from paying the deposit:

Select the relevant exemption reason:

- Fully sponsored: the applicant will be receiving full funding from a scholarship, government, charity or employer
- Full tuition fee scholarship: the applicant has been awarded a full tuition fee scholarship through the University of Leeds
- US Federal Loan recipient: the applicant has submitted a FAFSA. Please note that we will need to receive official confirmation directly from the loan authority before exempting the applicant
- Do not require a Tier 4 General Student Visa, as hold another immigration status: e.g. because the applicant has an EU passport or existing UK visa.

You must also upload evidence (such as a final letter of sponsorship award) using the Browse button.

Press Submit to complete the form.
If the evidence meets our requirements a confirmation email will be sent. If we cannot accept it you will receive an email explaining the problem and will see a new [Exemption Evidence Request](#) in the [Messages](#) section of the portal, where you can provide new evidence, following the steps above.

- If the applicant is waiting for scholarship results, please wait to fill out the Exemption Evidence Request until they have final, unconditional confirmation of funding. We cannot accept an application form as evidence.

- You may receive email reminders but there is no deadline to pay the deposit or to provide exemption evidence.

If the applicant will be paying their own fees:

Select the option **Do not meet any of the exemption criteria above**. This option includes students who are receiving financial support from family and friends.

You do not need to upload any evidence.

Press **Submit**.
A new section called **CAS Payments** will now display at the bottom of the applicant portal homepage.

- You cannot access this section directly from the agent homepage – you must first have selected the applicant.

Click on the heading to open it.

- The CAS Payments section will not display until the applicant completes the Exemption Evidence Request to confirm that they will be paying the deposit.

You will see the application for which the applicant has accepted an unconditional offer and needs to pay a deposit. This will be a:

- Master’s application for applicants receiving either a combined CAS or a CAS for a master’s only
- Pre-sessional application for applicants receiving a standalone CAS for a summer pre-sessional.

For combined CAS applicants, the displayed tuition fee will be for the master’s course only. The pre-sessional course will not appear as applicants do not need to pay a separate deposit for this course. Please refer to the applicant’s pre-sessional offer letter for the tuition fee.

Click on the application to proceed.
The **Fee Statement** will open. You will see the total fee for the course, the deposit required and any fees previously paid.

Click on the **Deposit Payment** button.

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The **Terms and Conditions** page will open.

Ensure the applicant reads the terms carefully, then **tick the box** to show that they agree.

Click **Proceed**.
You will now see the payment options screen. There are three ways to pay.

1. **Card payment**

   Applicants can pay by either credit or debit card. Click on the Card Payment button to go to the online payment system.

   Log in using the applicant’s student ID number and date of birth.

   Follow the on-screen instructions to complete the payment. Choose the payment option **Tuition Deposit**.

2. **Flywire**

   Applicants can pay through our payment partner, Flywire. This includes bank transfers. Click on Flywire Transfer to go to the external Flywire website.
Follow the on-screen instructions to complete the payment.

Choose the payment option **Tuition Deposit**.

3. Bank transfer

Although we accept direct bank transfers, we do not recommend this method as it can take longer for the deposit to arrive, you cannot usually track the payment and the bank may impose charges.

➔ **If the applicant does choose to pay by direct bank transfer, ensure they include their unique reference number (beginning DEP, as circled) so that we can match the payment to the applicant when it arrives.**

The applicant will not receive a DEP reference number until they have accepted an unconditional offer. **Please do not pay by bank transfer at an earlier (conditional offer) stage or without the reference number.**

Bank transfers made without the DEP reference number can take a long time to reach the applicant’s record. In some cases, we are unable to identify the applicant from their payment information. This delays the issuing of the CAS.
Once the payment has been received, it will display in the **CAS Payments** section in the column **Tuition Fee Paid to Date**.

We will also send you a confirmation email.

- **It may take up to three working days** for the deposit payment to be received and processed (bank transfers may take longer).

- **Please wait until after this time before contacting us to chase a payment that is not yet showing on the portal.**

- **There is no need to send us receipts of payments made following the portal instructions as our system will update automatically.**

The remaining required course fee will display in the **Tuition Fee Outstanding Balance** column.

If the applicant has made any payments towards their accommodation (excluding the deposit), they will display in the **Accommodation Fee Paid to Date** column.
The applicant can make further tuition fee payments through the CAS Payments section, if they wish.

They will need to follow the steps above to go to the Fee Statement.

There will be a new button labelled **Make Payment** that will take them directly to the payment information page.

The columns **Tuition Fee Paid To Date** and **Tuition Fee Outstanding Balance** will then be updated in the CAS Payments section.

If the applicant has not yet used their CAS, we will inform the UKVI that we have received an additional payment and send the applicant an updated CAS statement.

For more information on deposits, please refer to our Frequently Asked Questions page at [www.leeds.ac.uk/info/101050/fees_and_costs/89/tuition_fee_deposits](http://www.leeds.ac.uk/info/101050/fees_and_costs/89/tuition_fee_deposits).
Receiving a CAS

➤ You do not need to take any action to request a CAS.

As long as the applicant has provided all of their personal information (including valid passport details), accepted an unconditional offer and either paid the deposit or provided appropriate exemption evidence, the CAS will automatically be ready.

Applicants wishing to receive a combined CAS must make sure they have accepted both the pre-sessional offer and the unconditional master’s offer in the portal.

➤ We are only able to issue a CAS within six months of the start of the course.

We will send you and the applicant an email to confirm the applicant’s details prior to assigning the CAS. This is called a pre-CAS email, or a CAS check email.

It will include a link to a CAS information page with answers to common questions. You can also find a copy of this document at www.leeds.ac.uk/download/634/understanding_your_pre-cas_email.

➤ Please check the CAS information page before contacting us to query the details included in an applicant’s pre-CAS email.

If anything is incorrect, inform us immediately by using the Enquiries section of the applicant portal, choosing the subject CAS. (For guidance on sending enquiries, see pages 73 to 75.)

If the details are correct, you do not need to do anything. Unless we hear from you, we will assign the CAS using these details within three working days and email the CAS statement to you and the applicant.

From August, we will email the applicant with information about the start of term and where to pick up their welcome pack, which will have all of the information they need to register as a student and find out about life in Leeds.
Communications

There are two different types of communication in the portal:

- **Messages**: These are requests for further information and/or documents that the University sends to agents and applicants.

- **Enquiries**: These are queries that agents and applicants send to the University.
If the University requires further information we will send you a message in the portal. You will also receive an email notifying you to check the portal.

Click on the Messages heading to expand the section.

You will see the message subject, date it was sent, deadline to reply and message itself. The deadline is just a suggested date – you will still be able to reply after this time.

Click on the message subject to open the request.
In the **My Response** box, enter your reply to the message and upload any requested documents using the **Browse** button. Then press **Submit**.

- **You can only reply to a message once so please wait until you have all of the required information and/or documents before responding.**

- **Please ensure you reply directly to the message, not through an enquiry or an email. This ensures your response is sent to the course admissions team for faster consideration.**
Once you have sent your reply, the message will move to the Received Messages section, which you can find by clicking New Messages to open the menu.

You cannot edit your message or add any further documents once you have submitted it. If the University still requires further information, we will send you a new message.
Enquiries

If you have a query about an application, you can send the University an enquiry in the portal.

➤ You cannot send an enquiry directly from the agent portal homepage – you can only view previous enquiries. Instead, you must first choose the relevant applicant.

On the agent portal homepage, click on Applicants then search for the relevant applicant. Click on their first name to go to the applicant homepage.

(For guidance on searching in the portal, see pages 78 to 79.)

On the applicant homepage, open the Enquiries section.

Click on Create New Enquiry.
A new enquiry form will open.

You are required to select an **Enquiry Topic**.

- Please choose the most accurate topic as this helps us to answer your question more efficiently.

For example:

- Qualification Equivalences = queries about how international qualifications and grades compare to UK qualifications and grades
- Supporting Documents = for providing additional documents in support of a submitted application
- CAS = for any queries relating to the issuing of an applicant’s CAS.

Enter your query in the **Enquiry Details** box.

Attach any documents using the **Browse** button, if required.

Press **Send**.
You can now view the query in the Enquiries section of the agent portal, in the default view of Open Enquiries.

When the University responds, you will be notified by email to check the portal. Click on the enquiry to open it and view the response.

➔ If the University has requested more information in order to answer the enquiry, or it has been passed onto another department, the enquiry will remain in the Open Enquiries section. You can send a further response, if requested.

➔ If the University has been able to answer the query, the enquiry will be in the Resolved Enquiries section, which you can access by clicking on Open Enquiries. You will not be able to respond.
General tips for using the portal

Understanding ID numbers

There are three different ID numbers that you will see.

Application ID numbers, e.g. App00012345.
All draft and submitted applications have an ID number, which will display in the portal.

Student ID numbers, e.g. 201012345.
Once an applicant receives an offer, they will be given a student ID number, which will display in the applicant portal homepage.

Please note that it may sometimes take up to three working days to receive an ID number.

The student ID number does not currently display in the agent portal, though it is hoped that this will change shortly.
CRM numbers, e.g. CRM:0001234567.

Every automated email you receive from us about an application will have a CRM number in the subject line to help our system to link emails to the correct applicant. **We cannot use this number to search for applicants.** Please ignore this number.
The criteria you can use to find applicants and applications vary depending on the section of the portal in which you are searching.

In the **Messages** section, you can search by:

- Full or partial first name (e.g. searching for ‘an’ would bring up students named Andrew, Angela etc.)

To search by full or partial last name, you will need to use the wildcard * (e.g. to find a student with the last name Gupta, type *gupta).

In the **Applicants** section, you can search by:

- Full or partial first name
- Full or partial last name (e.g. searching for ‘li’ would bring up students named LI, LIANG, LIU etc.)
- Email address
In the **Applications** section, you can search by:

- Full or partial first name
- Application ID number
- Course

To search by full or partial last name, you will need to use the **wildcard** *.

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In the **Decisions** section, you can search by:

- First name
- Partial first name

To search by full or partial last name, you will need to use the **wildcard** *.

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In the **Enquiries** section, you will need to use **two wildcards** to search by either full or partial first or last name (e.g. to find a student named Adam, search *adam*).