ADVISER PORTAL
USER GUIDE

UCAS

CONTENTS

WHAT IS THE ADVISER PORTAL?

The adviser portal is a new tool designed for advisers to use when supporting undergraduate students applying to UK higher education. For the 2020 cycle, this replaces and enhances services previously available through Apply for advisers and Adviser Track – giving you complete oversight of your students' applications in one system.

To use the adviser portal you must:

> be a UCAS registered centre (e.g. school, college, careers office, or agent)

> have been set up with access by UCAS (if you are the registered centre correspondent), or by someone with relevant permissions at your centre

ABOUT THIS GUIDE

This guide will explain the steps you need to follow to start using our new adviser portal. It will also outline the key features, and demonstrate how to navigate your way around the portal.

Throughout this guide, we refer to the following individuals:

> **Registered centre correspondent** – the primary contact UCAS communicates with at a registered centre.

> **Staff** – any member of staff at the registered centre who has access to the adviser portal.

> **Student** – an individual intending to apply to study at a university or college.

> **Applicant** – an individual who has applied to study at a university or college.

ADVISER PORTAL SET UP CHECKLIST FOR UCAS REGISTERED CENTRE CORRESPONDENTS

1. **Register** an account with ucas.com.

2. **Verify** your email address.

3. **Sign in** using the email and password you've registered with.

4. Go the '**Adviser**' tab on your dashboard.

5. Complete the initial '**Set up wizard**':
   > Confirm centre details.
   > Set buzzword.
   > Set application fee payment option.

6. Go back to your dashboard and click on '**Staff management**' to:
   > add staff (ensuring the correct email address is used for each staff member)
   > add their permissions

Top tip – To help you complete your set up checklist, it's a good idea to set up one or two of your staff members with all permissions straight away. They can then help you complete any actions required.

7. Go back to your dashboard and click on '**Centre management'** to:
   > add group names
   > add staff to groups
   > add the referee details
   > add your qualification shortlist

8. Contact the staff you have set up to:
   > ask them to individually register an account with ucas.com
   > verify their email address
   > sign in using the email address and password they registered with

Your centre is now set up, and you and your staff are ready to start managing your students' applications!

Things to note...
   > UCAS registered centre correspondent permissions will be set up by UCAS.
   > UCAS registered centre correspondents will automatically have access to all groups.
   > Staff permissions need to be set by the UCAS registered centre correspondent.
   > All staff will automatically have access to the default group.

INTERNET BROWSER
AND
NAVIGATION

It is recommended that you use Google Chrome or Firefox to use the adviser portal, and that you use the adviser portal navigation buttons, rather than browser back arrows.

SECTION 1:

REGISTER AN ACCOUNT WITH UCAS.COM

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

9.

Before you can access and start using the adviser portal, you need to register an account with ucas.com and verify it – you'll only need to do this once.

The email address and password you register with will then be required whenever you sign in to use the adviser portal.

1.1 Register as a new user

To register:

1. Go to **www.ucas.com**, or **www.ucas.com/advisers**.
2. Click '**Sign in**' in the top right-hand corner and select **'Advisers / Agents'** (see Fig. 1).
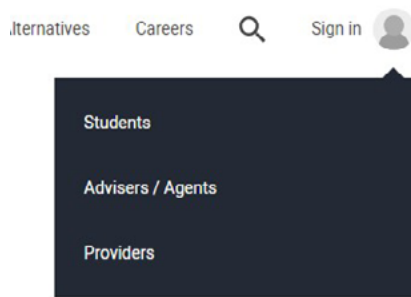

Fig. 1: Registration sign in

3. Click the '**Register and sign in to the adviser portal**' button under 2020 entry (see Fig. 2).
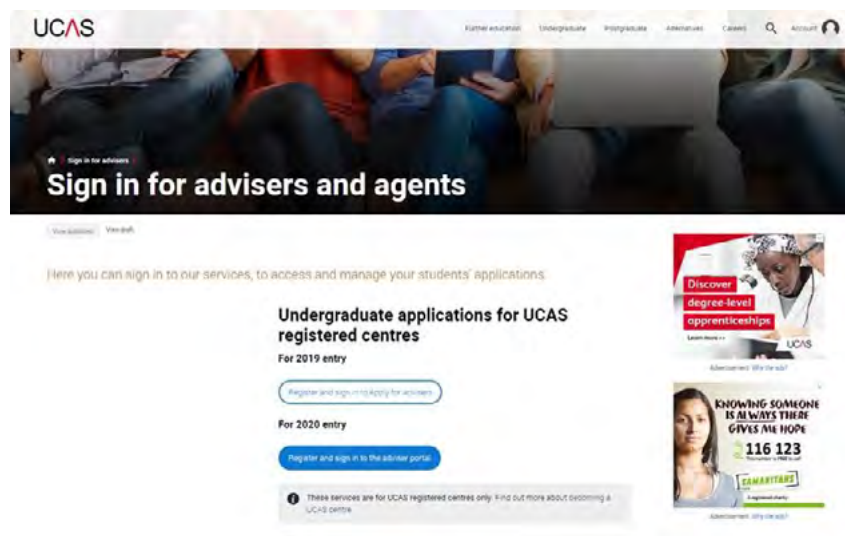

Fig. 2: Registration and sign in

4. Click '**Register here**' (see Fig. 3).

Fig. 3: Registration here

5. You will then be taken through a five-step registration process (see Fig. 4).

Fig. 4: Registration process

If you are the UCAS registered centre correspondent, it's important you register with the email address we hold for you. We use your email address as a unique identifier, allowing us to link you, your centre, and your access, to the adviser portal. If you update or change your email address at any point, please let us know as soon as possible.

If you are staff, it's important you register with the email address your centre's UCAS registered correspondent has set you up with. This has been used to set your permissions and access. If your email address changes, you'll need to inform your centre's UCAS registered correspondent and ask them to update the system, including your details in **'Staff management'** and **'Group management'**. You will also need to register again on ucas.com using your new email address.

(i) You may have already registered to personalise your use of ucas.com. If so, a message will appear advising you that the email address is already in use (see Fig. 5). If you have forgotten your password, click '**Forgotten password**' to reset it.

Top tip – When registering, whatever you put in the 'First name' field will be displayed on your dashboard e.g. 'Sarah's dashboard'.

Fig. 5: Email address in use message

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

11.

1.2 Passwords

Account passwords need to be secure, and must contain at least eight characters (but no more than 30), upper and lowercase letters, at least one number, and one special character (e.g. $,!,&, %).

If you forget your password, you will be able to reset your account by using the '**Forgotten password**' link on the sign in page. **UCAS is not able to reset account passwords for users**.

1.3 Verify your account

Once you have registered, you will be sent an email from mail-service@gigya-raas.com asking you to activate your account. You will need to click the '**Activate account**' link in the email before you can sign in (see Fig. 6).

Fig. 6: Verification email
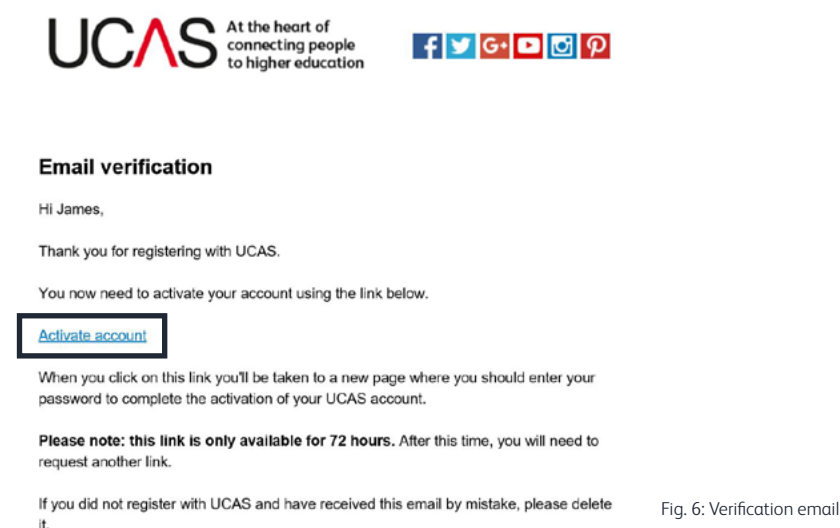
1.4 What should I do if I haven't received the activation email?

Check your spam or junk folder, as the email should appear within a couple of minutes of the registration being completed.

If you haven't received it, add the email address it was sent from (mail-service@gigya-raas.com) to your safe senders list, and ask your IT team to whitelist it.

SECTION 2:

ADVISER PORTAL

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

13.

2.1 Adviser portal sign in

After you've registered, to sign in to the adviser portal, go to **ucas.com/advisers** (or quick link **ucas.com/advisers/sign-in**):

1. Click '**Sign in**' in the top right-hand corner and choose '**Advisers / Agents**'.
2. Click the **'Register and sign in to the adviser portal'** button under 2020 entry.
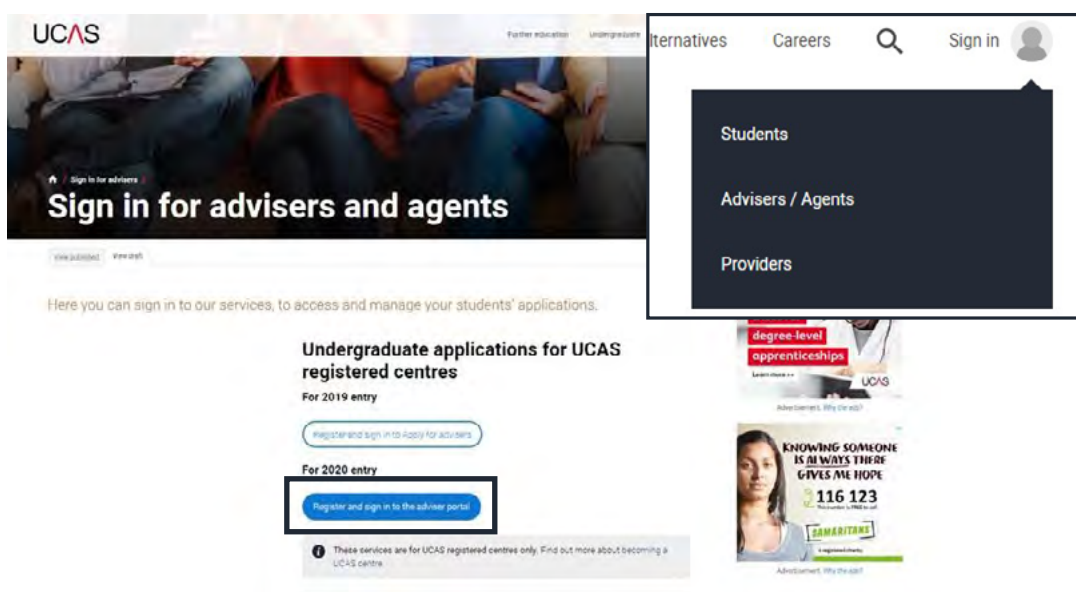3. Sign in using the email address and password you registered with.

Fig. 7: Adviser portal sign in page

2.2 Your dashboard

Each time you sign in, you will be taken to your user dashboard. To navigate to the adviser portal, select the **'Advisers'** tab at the top of your dashboard (see Fig. 8).

On your dashboard, there will be up to five different management tools available to you. How many of these you have access to will depend on your permissions. UCAS registered centre correspondents will automatically have access to all five.

In addition to the management tools, you will see an '**Adviser information and advice**' section. This contains links to signpost you to relevant information and advice you might need.

All users will have access to the following additional tabs on their dashboard:

> **Postgraduate** – where you view, update, and manage your own personal postgraduate applications.
> **My courses** – where you will find any courses you have shortlisted from the UCAS search tool.

These tabs won't be relevant to everyone.

13.

Fig.8: Dashboard

2.3 For registered centres who are also agents

If you are also an agent managing UCAS Postgraduate applications, you may have access to the new agent portal. You can view this by selecting the **'Agents'** tab on your dashboard (see Fig. 9).
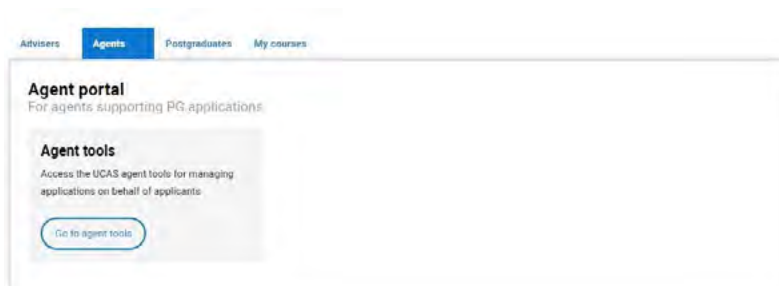
Fig.9: Agent portal

Your dashboard will be where you access both the agent portal for UCAS Postgraduate applicants, and the adviser portal for UCAS Undergraduate applicants. When you sign in, your dashboard will automatically open to the adviser portal tab. To use the agent portal, simply switch tabs.

From 2021 entry, you will manage all UCAS Undergraduate and UCAS Postgraduate applications through the agent portal.

2.4 Summary of the adviser tools

There will be up to five different management tools available to you. How many of these you have access to will depend on your permissions. UCAS registered centre correspondents will automatically have access to all five.

The different management areas are:

> **Application management** – view and manage details of your students' applications, progress, and references.
> **Tracking offers and decisions** – view details of your applicants' offers and decisions, and download your Application Status Report (ASR).
> **Centre management** – view and manage details relating to your registered centre(s), including the buzzword, setting payment of application fee, qualification shortlist, and groups.
> **Staff management** – view and manage staff at your centre(s) and their permissions.
> **Data and reporting** – find information about value added, paid for data and reporting services for your centre(s).

If you are an adviser at more than one registered centre, you will be presented with a centre list to choose from within each management area (see Fig. 10).

< Back to my dashboard

Centre management
Centres list

Search by name or code:

Search for centre by name or code

Found 2 centres

- 19440 - UCAS Training London
- 19048 - UCAS Training School

Fig.10: Multi-centre user

Top tip – To navigate through the adviser portal or return to your dashboard, use the navigation tool at the top left of each page, rather than the back button in your browser (see Fig. 10).

15.

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

16.

2.5 Language preference settings

To change your preferred language setting to Welsh in the adviser portal, click on '**Account**' and choose '**Preference settings**' (see Fig. 11).

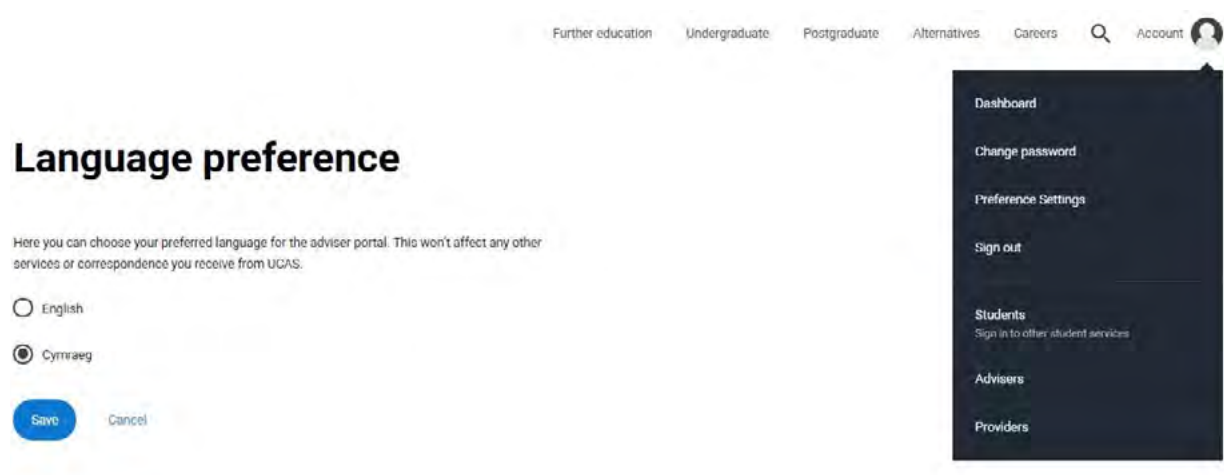This won't affect any other services or correspondence you receive from UCAS.

Fig.11: Language preference settings

SECTION 3:

SET UP WIZARD

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

3.1 Registered centre correspondent

UCAS will create access permissions for the registered centre correspondent only.

It is their responsibility to complete the centre set up wizard, before you can begin linking to applicants.

The first time you try to access centre management in the adviser portal, you will be taken through a compulsory set up wizard (see Fig.12). This requires you to:

> confirm centre and reference details
> select application fee payment option
> create your centre's buzzword

Once you have completed these steps you will automatically be taken into '**Centre management**' (see section 5).

Fig.12: Set up wizard

3.2 Confirm centre and reference details

The details in this section will be used by universities and colleges as the default information to contact your centre's referees.

You can set up each referee with individual contact details if you would prefer (see section 5.9).

You are not able to edit or update your centre name, UCAS centre number, or centre type (see Fig. 13). If these details are incorrect, please call our Schools Team between 08:00 – 18:00 (UK time), Monday to Friday:

> Phone from the UK – 0345 123 8001
> Phone from outside the UK – +44 330 333 0239
> Email – adviserhelp@ucas.ac.uk

You can also identify any dates that your students will be unavailable. This is to discourage universities and colleges from inviting applicants to interviews, or contacting referees, during holiday periods, for example.

If at any point during the cycle you need to update your '**Centre and reference details**' this can be done in '**Centre management**' (see section 5.1).

Fig.13: Centre and reference details

SECTION 1: REGISTER ON UCAS.COM	SECTION 2: ADVISER PORTAL	SECTION 3: SET UP WIZARD	SECTION 4: STAFF MANAGEMENT	SECTION 5: CENTRE MANAGEMENT	SECTION 6: APPLICATION MANAGEMENT	SECTION 7: INDIVIDUAL APPLICATION RECORD VIEW	SECTION 8: TRACKING OFFERS AND DECISIONS	SECTION 9: DATA AND REPORTING

3.3 Select application fee payment option

Payment is required for UCAS Undergraduate applications. In **'Centre management'**, select how you would like students at your centre to pay for their applications in the **'Pay and send'** section of Apply. You can choose one of the following:

> UCAS to send your centre an invoice (applicants should not send payments directly to UCAS).
> All your applicants to pay online by credit card or debit card.
> Some applicants to pay online by card, and UCAS to provide an invoice for the remaining applicants (the invoice is to be paid by your centre).

If, at any point during the cycle, you need to update your '**Application fee payment methods**' this can be done in '**Centre management**' (see section 5.8).

3.4 Create your centre's buzzword

The buzzword is a unique term you can give to students applying through your centre. They will be asked for the buzzword when they register in Apply. If they enter the correct buzzword they will automatically be linked to your centre, meaning you can view and manage their applications. If students register without linking to a centre, they can enter the buzzword in the '**Options**' menu in Apply.

If, at any point during the cycle, you need to update your buzzword, you can do this in '**Centre linking (buzzword)**' within '**Centre management**' (see section 5.3). Remember, if you do change your buzzword, let your staff and students know what it is.

3.5 Additional centre set up requirements

It is not possible to carry over previous settings from Apply for advisers. Therefore, you need to complete the following information **in addition** to the set up wizard, as part of your overall centre set up, and before applicants can link to your centre:

In **'Staff management'** (see section 4):
> add your additional staff users
> set your staff access permissions

In **'Centre management'** (see section 5):
> create your qualifications shortlist
> set up your groups
> add referee contact details

SECTION 4:

STAFF MANAGEMENT

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

21.

In '**Staff management**' you can (see Fig. 14):

> add staff members
> view the staff list for your centre
> manage staff permissions
> remove staff members

Top tip – Remember, we won't be rolling over staff details or permissions from Apply for advisers. All staff who need access to the adviser portal need to be added and set permissions by the UCAS registered centre correspondent. Once set up, they'll need to register on ucas.com (see section 1).
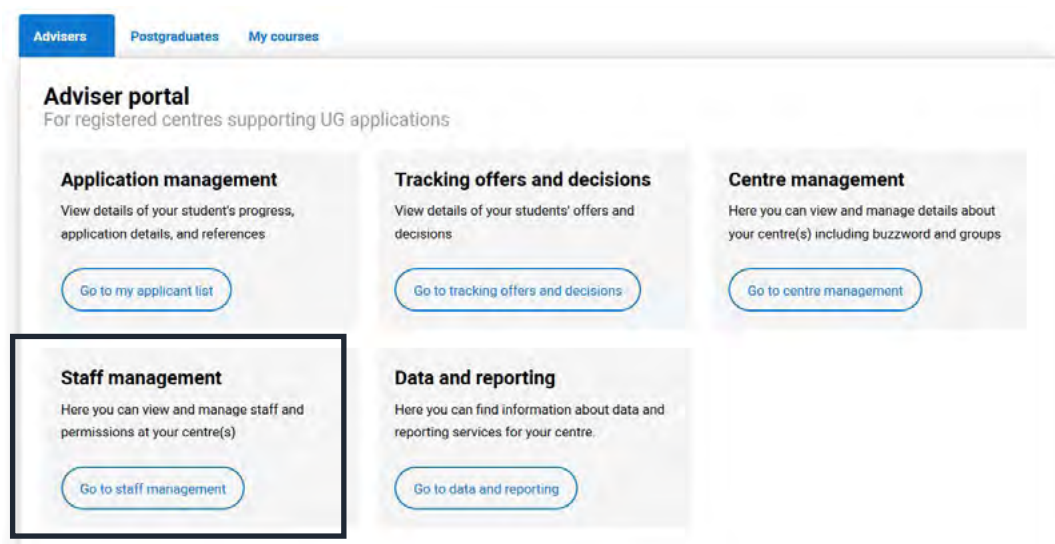
Fig.14: Staff management

Initial set up tasks:
☐ Add staff members (see section 4.2).
☐ Set staff permissions (see section 4.3).
☐ Add staff to group(s) required (this is done in **'Centre management'**, see section 5.5).

4.1 Staff list

In this section, you will see your centre's **'Staff list'** (see Fig. 15). The **'Search bar'** above the staff list allows you to search for staff members, rather than scrolling through the list.

The **'Reset'** button, below left of the search bar, clears your search terms.

The '**Add staff member**' button, below right of the search bar, allows you to add staff members (see section 4.2).

The grey chevrons next to the column header titles allow you to reverse the sort order of the first names, last names, and email addresses.

The '**View**' and '**Remove**' buttons under the '**Actions**' column allow you to manage each staff member's access (see sections 4.5 and 4.6).
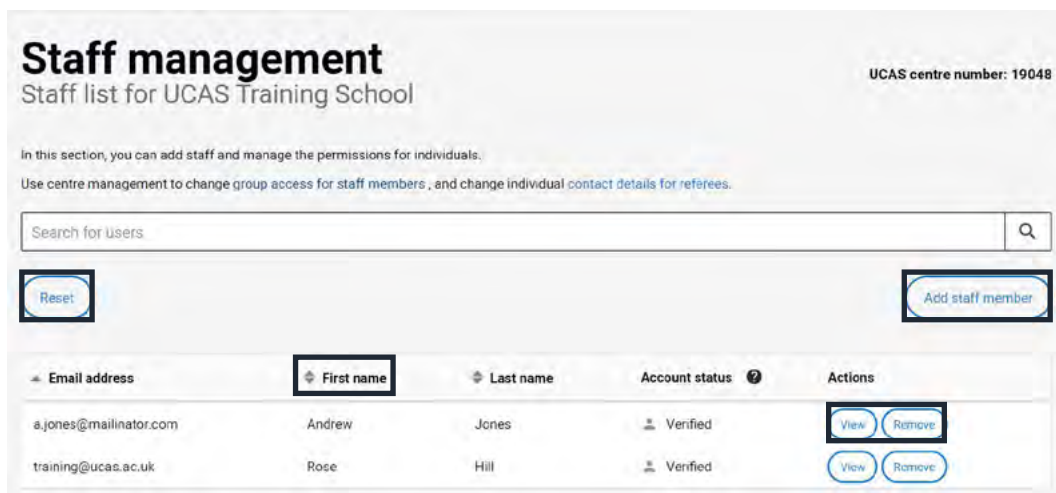
Fig.15: Staff list

4.2 Add staff member

To add a new staff member, click on the '**Add staff member'** button (see Fig. 15).

A new screen (Fig. 16) will appear, allowing you to enter the new staff member's email address.
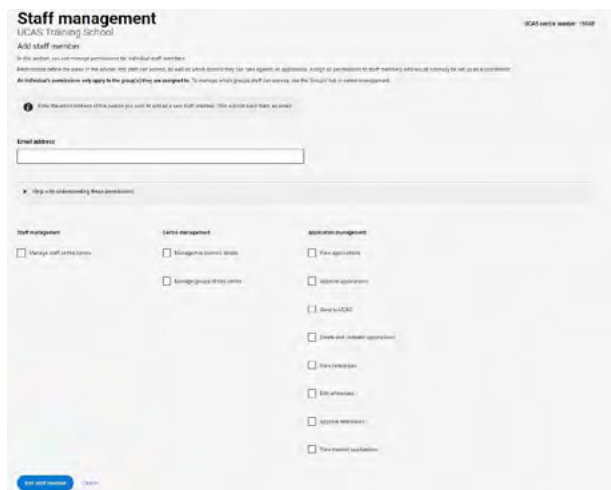
Top tip – The email address used when adding a staff member needs to be the same as the one they use to register on ucas.com (see section 1). If they don't match, the staff member will not be able to access the portal.

Fig.16: Add new staff member

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

23.

4.3 Setting new staff member permissions

Once you have entered the staff member's email address, you need to set their access permissions to define:

> the areas of the adviser portal they can access
> which actions they can take against an application

Top tip – A staff member's permissions only apply to the group(s) they are assigned to. You can use the **'Groups'** tab in **'Centre management'** (see section 5) to manage which groups they can access.

To allocate permissions, select as many of the actions that you require the staff member to have access to (see Fig. 16). Click on 'Help with understanding these permissions' for a summary of the actions they will be able to do if permission is given.

Staff management gives them access to staff management tools.

Manage staff at this centre allows a staff member to:

> add staff members
> grant permissions
> remove staff members

Centre management gives them access to centre management tools. Staff with permission to manage centre details only will not be able to manage groups or applicants requesting to link to the centre.

Manage this centre's details allows a staff member to:

> edit centre details
> create a buzzword
> set payment options
> set a shortlist of qualifications
> link applications to centre

Manage groups at this centre allows a staff member to:

> create and edit groups
> assign staff to groups
> add applicants to groups
> remove applicants from groups
> approve applicants requesting a link to your centre

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

Application management gives them access to application management tools. Staff without any application management permissions will not be able to view, edit, or approve applications or references.

View applications allows a staff member to:

> view applications
> add application notes
> view audit trails

Approve applications allows a staff member to:

> approve applications
> return applications to applicants
> check qualifications

Send to UCAS allows a staff member to:

> send applications to UCAS

Delete and undelete applications allows a staff member to:

> delete applications
> undelete applications

View references allows a staff member to:

> view references
> view predicted grades

Edit references allows a staff member to:

> add references
> edit references
> delete references
> edit predicted grades

Approve references allows a staff member to:

> approve references
> edit predicted grades
> return references to referees

Tracking offers and decisions allows staff to access applicants' offers and decisions, and download the Application Status Report (ASR) in real-time. Staff will only have access to the students in their group(s).

Top tip – When adding all your staff members and their permissions, we recommend you start by assigning all permissions to staff members who would normally be set up as a coordinator – to do this, tick all the boxes. They can then help you set up your centre's account.

SECTION 1: REGISTER ON UCAS.COM	SECTION 2: ADVISER PORTAL	SECTION 3: SET UP WIZARD	SECTION 4: STAFF MANAGEMENT	SECTION 5: CENTRE MANAGEMENT	SECTION 6: APPLICATION MANAGEMENT	SECTION 7: INDIVIDUAL APPLICATION RECORD VIEW	SECTION 8: TRACKING OFFERS AND DECISIONS	SECTION 9: DATA AND REPORTING

25.

Once you have selected all the required permissions click '**Add staff member**', and you will return to your staff list. The new staff member will automatically be added (Fig. 17).

If you have access to '**Staff management**' it is possible to remove your own permissions. If you remove your own permissions, you won't be able to add them again, as you are only able to give the same level of permissions that you have. You would have to ask someone else with that permission at your centre, or UCAS, to add them back in. We do not recommend that you remove your own permissions.
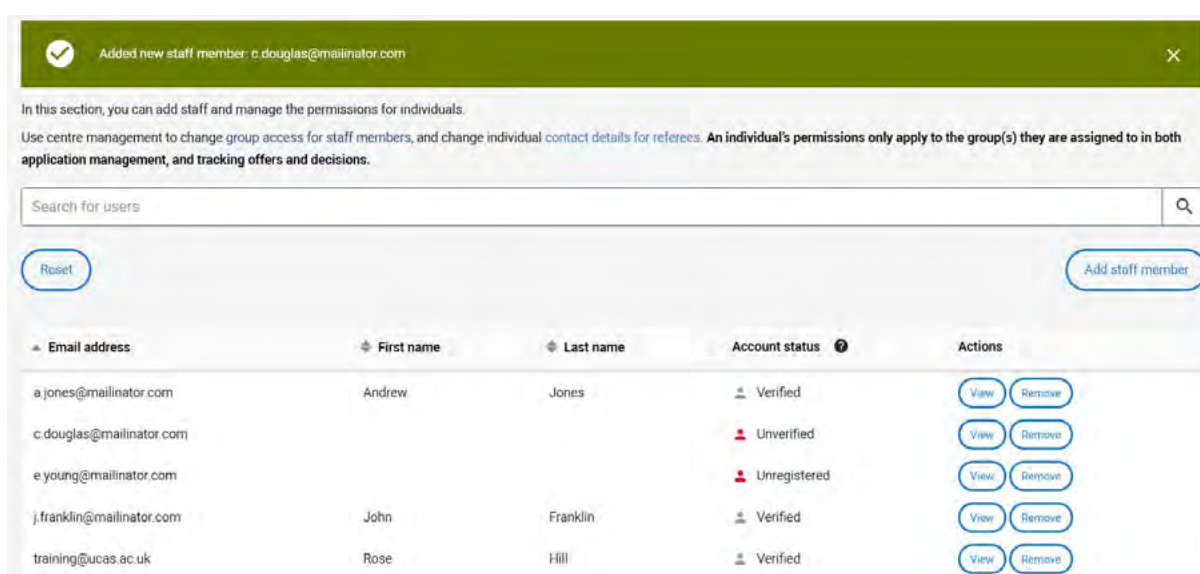
Fig.17: Add new staff member

4.4 Account status

The **'Account status'** column shows if a staff user has completed their ucas.com account registration, and indicates if any action needs to be taken (see Fig. 17).

The statuses are:

> **unregistered** – a user who has either not started, or not completed their registration. You need to inform the staff member to register on ucas.com, and verify their account using the activation link in the verification email they will be sent (see section 1)

> **unverified** – a user has started the registration process, but hasn't verified their email address. You need to inform the staff member to verify their account using the activation link in the verification email they were sent when they registered (see section 1)

> **verified** – a user has registered and verified their email account, so they are now able to sign in and access the adviser portal

Top tip – Staff members must be in the status **'Verified'** to access the adviser portal.

4.5 Viewing a staff member's details

Clicking the '**View**' button will display the staff member's details and permissions (see Fig. 17). Permissions can be changed by using the tick boxes, and saving.

If you want to set up a referee, without giving them permission to sign in, you do this in **'Centre management'**.

Top tip – Changing group access or individual contact details for referees is done in **'Centre management'** (see section 5).

4.6 Removing a staff member

Clicking the '**Remove**' button for a staff member will remove them from the staff list, and remove any actions or permissions they had.

Once a staff member has been removed, to give them access again you would have to select '**Add staff member**' and reselect their permissions.

SECTION 5:

CENTRE MANAGEMENT

Fig.18: Centre management

In '**Centre management**' you can view and manage the following details about your centre(s) (see Fig. 18):

> centre and reference details
> contacts
> centre linking (buzzword)
> qualification shortlist
> groups
> application fee payment methods
> referee contact details

Top tip – Hover over the question marks in any area of the adviser portal to see help text.

5.1 Centre and reference details

The information in this section is used as default contact information for new referees. It is important the information is accurate and up-to-date. You can edit and update all the information yourself, apart from your centre name, UCAS centre number, or centre type.

If these details are incorrect, please contact our Schools Team between 08:00 – 18:00 (UK time), Monday to Friday:

> Phone from the UK – 0345 123 8001
> Phone from outside the UK – +44 330 333 0239
> Email – adviserhelp@ucas.ac.uk

Changes made here will not update existing referees' details. To update individual referee contact details, use the '**Referee contact details**' (see section 5.9).

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

Your UCAS centre number is shown in the top right of every page. This is a unique number, used to identify your centre (see Fig. 19). You need this if you contact UCAS.

Fig.19: Centre and reference details

Top tip – When changes you make have been successfully saved, a green information banner will appear in the portal.

5.2 Contacts

These are the details used by UCAS to contact your centre. The registered centre correspondent will be UCAS' main contact for key operational updates, and will receive our monthly adviser newsletters. Please make sure this information is correct and kept up-to-date.

These details cannot be edited in the portal. To request a change please email **adviserhelp@ucas.ac.uk**, with your centre number, their full name, job title, email address, and telephone number, so we can update our records.

Please note, updates won't appear in the portal if they are requested after the centre has been registered. They will be changed in the next cycle.

5.3 Centre linking (buzzword)

The buzzword is a unique term you can give to students applying through your centre. You can pick a new buzzword at any time in the cycle, but please remember to let your staff and students know if it changes.

Students will be asked for the buzzword when they register in Apply. If they enter the correct buzzword, they will automatically be linked to your centre, meaning you can view and manage their applications.

To change your buzzword, click '**Edit**' then enter your new buzzword into the text box (see Fig. 20). Remember to click '**Save**' to confirm your changes.

Fig.20: Changing your buzzword

Top tip: To avoid confusion between application cycles, we recommend using a different buzzword from the one used in the previous cycle.

If students register without linking to a centre, they can enter the buzzword in the **'Options'** menu in Apply, and send a request to either:

> be linked to your centre

> to ask for your centre to provide a reference for their application

Any requests to link to your centre will be listed in this area, and will indicate whether the applicant is requesting **'Full application'** or **'Reference only'**. Click the arrows next to the applicant's name to see their full details, and to accept or reject the request (see Fig. 21).

Fig.21: Linking to centre

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

'**Full application**' means your centre manages and sends their application. If you accept the request, the applicant will be assigned to the group you have selected (See Fig. 21). If you reject the request, the applicant will be notified in the **'Options'** menu in Apply.

'**Reference only**' means your centre will need to add a reference to the application, but will not be able to manage the application. If you accept the request, the applicant will be added to the applications list and identified as **'Reference only'**. You will only be able to see the applicant's details relating to their reference (see section 6). If you reject the request, the applicant will be notified in the **'Options'** menu in Apply.

If you wish to change the request type, please contact the applicant directly.

You will also be able to see if any applicants have requested to link to your centre using the quick links from the '**Applications list**' (see section 6.1).

5.4 Qualification shortlist

Here you can create a qualification shortlist that will be shown to your students when they are completing the education section in Apply. Creating a shortlist helps them enter the correct qualifications – particularly important if there are similar qualifications to choose from.

Qualifications can be added and removed from the shortlist at any time during the cycle.

To add qualifications to your shortlist, click '**Add new**'. You can use the search bar to find the relevant qualifications for your centre. Qualifications remain grouped in the same way as Apply for advisers. Please note, you cannot search using abbreviated qualifications titles, e.g. A level. Select as many qualifications as required, and then click '**Save**' (see Fig. 22).

Fig.22: Qualification shortlist

Fig 23: Qualification view

Once you have saved your selections, the qualifications you have added will be grouped together on your shortlist. The number of qualifications in each grouping will be displayed alongside. Click on the arrows to the left of each group to expand/collapse the view of the qualifications (see Fig. 23). There are also '**Expand all**' and '**Collapse all**' links at the top of the shortlist.

Clicking on '**Remove**' in the expanded view (Fig. 23) will automatically remove a qualification from your shortlist.

5.5 Creating a new group

Initial set up tasks:
- ☐ Ensure you add staff and set their permissions in '**Staff management**' before creating any groups.
- ☐ Create new groups for your centre.
- ☐ Assign staff members to the groups.

To create a new group, click '**Add new**', and enter the group name. You'll then need to assign any staff you want to have access to this group.

To add and assign a member of staff to a group, type their name into the search box to select them. You can add as many members of staff as necessary. Their names will appear under the search box once they have been selected (see Fig. 24).

You can also remove them from this list, by clicking '**Remove**'. Once you have added your staff to the new group, remember to click '**Save**'.

All staff will be given permission to the default group, but can be removed from it, if needed. Permissions to view, manage, and submit applications and references are controlled in '**Staff management**' (see section 4).

Fig.24: Add new group

32.

SECTION 1: REGISTER ON UCAS.COM	SECTION 2: ADVISER PORTAL	SECTION 3: SET UP WIZARD	SECTION 4: STAFF MANAGEMENT	SECTION 5: CENTRE MANAGEMENT	SECTION 6: APPLICATION MANAGEMENT	SECTION 7: INDIVIDUAL APPLICATION RECORD VIEW	SECTION 8: TRACKING OFFERS AND DECISIONS	SECTION 9: DATA AND REPORTING

33.

Top tip – A staff member's permissions will be the same for all groups they are assigned to, and to both **'Application management'**, and **'Tracking offers and decisions'**.

Once a group has been created, it will automatically appear in your '**Group list**' (see Fig. 25).

5.6 Reassigning staff to groups

Click the arrow to expand a group, to see the staff members (and students) who are assigned to it.

Click '**Edit**' to update a group name, or to add or remove staff members (and students) (see Fig. 25).

To reassign staff to a different group, use the search box function, and then reallocate them using the drop-down menu (see Fig. 26).

Fig.25: Group list

5.7 Assigning students to groups

Students will be asked to choose a group in Apply when they link to your centre. If you don't set up any groups, applicants will automatically appear in the '**Default Group**'.

To reassign students to a group, click next to a group name to expand it, and then click '**Edit**' to add or remove any students (see Fig. 25).

You can select multiple students in a group, and move them out into a different group using the drop-down menu (see Fig. 26). You can also use the search box to search within the group.

Fig.26: Move students from groups

Top tip – If you delete a group, all members (staff and students) will automatically be moved into the default group.

5.8 Application fee payment methods

Payment is required for UCAS Undergraduate applications, and there are three options to choose from. Click **'Edit'** to select the fee payment method for your centre. Remember to click **'Save'** to update the payment option (see Fig. 27).

If you choose for UCAS to send your centre an invoice, then you pay the application fees for all applications made through your centre. You can ask for reimbursement from your students.

If you choose for all your students to pay online by credit or debit card, they will have to pay for their own applications when they submit them.

If you choose for some of your students to pay online by card, UCAS will provide an invoice for the remaining applicants. This invoice is to be paid by your centre. Applicants will be given both options in Apply, as this cannot be assigned to individuals.

Fig.27: Fee payment option

5.9 Referee contact details

Here you can add referees for your centre, and their contact details. When adding a reference to an application, the names listed here are the ones that will available to choose from (see section 7.5).

When adding a new referee, contact details will be copied from the '**Centre and reference details**' tab, but you can overwrite if needed.

To add a referee, click '**Add new**', enter the relevant details, and click '**Save**'. The referee will automatically appear in the referee list (see Fig. 28).

Clicking the arrow to the left of a referee's name will expand and collapse the view, to display or hide the details.

In the expanded view, '**Edit**' and '**Delete**' buttons enable you to make changes to the details, or remove the individual from your list.

There are also '**Expand all**' and '**Collapse all**' links at the top of the list.

Initial set up tasks:
> Enter the details for all referees required. Universities and colleges will see this information as part of the reference, and be able to contact the referee, if needed.
> If you require these referees to access the portal, you need to add their details in '**Staff Management**' and set the relevant permissions.

Fig.28: Referee contact details

SECTION 6:

APPLICATION MANAGEMENT

Fig.29: Application management

In '**Application management**' (see Fig. 29) you can:

> view applications
> view section progress (which sections of the application have been completed)
> view application status (what your centre has done towards submitting the application to UCAS)
> view, add, edit, and approve references
> view, add, and edit predicted grades
> delete and undelete applications
> approve applications
> send applications to UCAS

The permissions set may restrict your access and ability to carry out all individual actions.

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

38.

6.1 Applications list

Your '**Applications list**' is displayed once you enter the application management area (see Fig. 30). This is the central screen from which you can navigate and view applications. You will only be able to view and manage applications in the group(s) you have permission to access.

Top tip – A staff member's permissions only apply to the group(s) they are assigned to. To manage which groups staff can access, use the **'Groups'** tab in **'Centre management'** (see section 5).

Once your students have registered, you can view individual applications at any stage. You do not have to wait until they are complete.

You can change the '**Applications list**' view to display by:
> student details
> status
> section progress

Clicking an applicant's name will take you through to their application (see section 6.4).

Fig.30: Applications list

Top tip – You can use the grey arrows in the headers to reorder the column display.

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

39.

6.2 Quick filters

At the top of the screen, in any of the views, you can use the **'quick filters'** to help you manage applications (see Fig. 31). These show the number of applications waiting, in various statuses, that require an action to be taken. These are:

> ready for review
> reference needs approval
> reference only application
> ready for reference
> ready to send
> waiting to link to centre
> reference in progress
> deleted applications

By clicking a quick filter, the applications list will automatically be updated to display the relevant applications. Only one filter can be applied at a time. To remove the filter, click the cross next to the link (see Fig. 31).
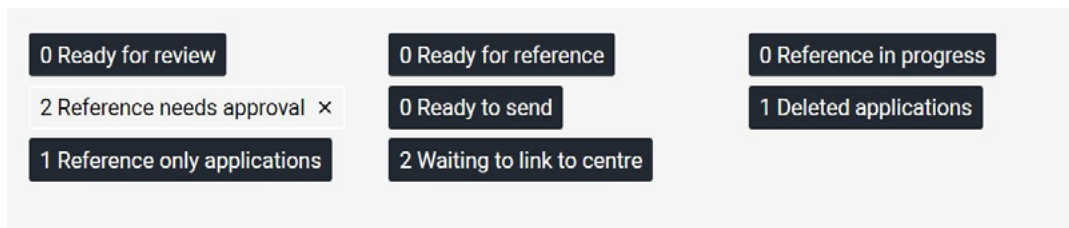
Fig.31: Quick filters

If you choose the '**Waiting to link to centre**' quick link, it will automatically direct you to this area of '**Centre management**' (see section 5.3). If you have the necessary permissions, you can accept or decline the request.

6.3 Student details

In the '**Student details**' view of the applications list, you can see columns displaying:

> student's first name
> student's last name
> the date (in time order) the application was submitted to your centre
> the group the applicant is assigned to
> the earliest relevant UCAS deadline for the course choices
> the application status
> the reference status
> the applicant's Personal ID
> how the application fee has been paid

39.

Each column has a search box, which can be used to quickly filter specific applications. Start typing in the relevant box(s) to return a filtered set of applications, e.g. search for 15 Oct deadline applications, or references that are awaiting approval (see Fig. 32). You can apply more than one filter.

The application statuses are:
> In progress
> Awaiting approval
> Returned to applicant
> Approved
> Sent
> Reference only

The reference statuses are:
> Not started
> In progress
> Awaiting approval
> Approved

Top tip – If you click through the different view options (student, status, and section progress) the filter(s) remain in place, while you have search criteria entered in a search box. To remove the filters, clear the search boxes.

Fig.32: Search boxes

40.

6.4 Status

In the '**Status**' view of the applications list you can see an overview of which actions your centre has completed for an application (see Fig. 33).

You can reorder the display using the grey arrows next to the first and last name column headers, and view an individual's record by clicking anywhere in the row for that applicant.

Fig.33: Status view

6.5 Section progress

In the '**Section Progress**' view of the applications list, you can see an overview, and monitor which sections of the application each of your students has completed (see Fig. 34).

You can also see which students have ticked the 'opt in' box to share details of their application, and its progress with your centre post-submission.

Applicants give permission for the tracking opt in by ticking a box in the '**Pay & send**' section of Apply. If this box is ticked, their application will be visible to your centre post-submission to UCAS, and you'll be able to track it. They'll also be included in any data and reporting you choose to receive from UCAS (see section 9).

If permission is not given, a tick will not appear in the '**Tracking opt in**' column, and the record will not be visible to your centre post-submission.

Fig.34: Section progress

41.

SECTION 7:

INDIVIDUAL APPLICATION RECORD VIEW

SECTION 1: REGISTER ON UCAS.COM	SECTION 2: ADVISER PORTAL	SECTION 3: SET UP WIZARD	SECTION 4: STAFF MANAGEMENT	SECTION 5: CENTRE MANAGEMENT	SECTION 6: APPLICATION MANAGEMENT	SECTION 7: INDIVIDUAL APPLICATION RECORD VIEW	SECTION 8: TRACKING OFFERS AND DECISIONS	SECTION 9: DATA AND REPORTING

43.

Clicking on a student's name in the applications list will take you into their application details. All their application details are displayed on a single page.

The applicant's name, Personal ID, group they are assigned to, and their current application status are displayed in the top left. This information is not editable here, but the group and status will reflect the current position.

In application details, you can scroll through the whole application. Alternatively, click the section links on the left to view the individual sections of the application, the predicted grades, reference, and application history. A green status confirmation, in the top right of the details, will appear when a section is complete, as identified by the student (see Fig. 35).

You can use the '**Previous application**' and '**Next application**' buttons to navigate.

7.1 Notes

Notes of up to 250 characters can be entered in the new notes field at the top right of an application, by any staff users with relevant permission. Any staff user with '**View application**' permissions will be able to add, edit, and view the notes displayed.

To add or edit a note, click '**Edit**' on the application details screen (see Fig. 35). Then type/paste/edit the notes in the box provided (see Fig. 36).

Click '**Save**', and a green information banner will appear to show the note has been added (see Fig. 37).

You can use the notes to set yourself reminders. If you are leaving notes for other staff members, it could be useful to put a date or initials next to it.

Fig.36: Notes

Fig.37: Notes added

Top tip – These notes will not be shared with the applicant, unless requested under the Data Protection Act 2018. They are not visible to universities or colleges.

7.2 Actions

Clicking '**Actions**' will display a drop-down list, containing all the actions currently available for the applicant, as 'live' blue links. Unavailable actions are greyed out (Fig. 38).

Actions that can be carried out will differ, depending on the application status. The '**Actions**' menu reflects which actions are now available/unavailable as a result of the change made.

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

45.

Fig.38: Actions

The following actions can be carried out:

> **Approve**: The application should only be approved once it has been thoroughly checked, and you are sure all the information has been entered correctly. Once an application has been approved, a green banner will appear to confirm this. Both the application and reference need to be approved before an application is ready to be sent to UCAS.

> **Unapprove**: An application can be unapproved, if necessary. A green banner will appear to confirm this has been completed. You can then return the application to the applicant for amendments.

> **Return to applicant**: A pop-up will appear, for you to enter a message of up to 250 characters for the applicant (see Fig. 39). This will display when they sign in to Apply. You can filter applications by the status '**Returned to applicant**' in your application management list (see section 6.3). When you return an application, the **'Date submitted'** will become blank. When an applicant resubmits, it will be updated with the new **'Date submitted'**.

Fig.39: Return to applicant

> **Delete**: The application will be deleted, and a green banner will appear to confirm this. The application will disappear from the application list, and the applicant will no longer be able to sign in to Apply.

> **Undelete**: There is now an **'Undelete'** action. Deleted applications are stored, and can be undeleted by staff with relevant permissions. If **'Undelete'** is selected from the list of actions, the application will be undeleted, and a green banner will confirm this (see Fig. 40).

Top tip – To view deleted applications, use the quick filter on the applications list (see Fig. 31).

45.

Fig.40: Actions confirmation

> **Submit**: The application will be submitted to UCAS for processing. The application history will be updated to reflect who did this, and when (see section 7.7).

> **Reset password**: A pop-up will display, asking you to confirm you want to change the password (see Fig. 41). If you click **'Yes'** and have appropriate permissions, you will be taken through to change the password for the applicant in Apply.

Fig.41: Password reset

> **View full application**: You will be taken to a preview screen of the full application. A black banner at the top informs you that you are in preview mode (see Fig. 42).

Fig.42: View full application

7.3 Predicted grades

If an applicant is still studying or waiting for results, you will give a predicted overall achievement in the predicted grades section.

You will only be able to add predicted grades if the applicant has listed the qualification as '**pending**' in Apply. Make sure you click save after editing.

Staff can add predicted grades for each qualification entered by the applicant, if they have permission to edit the reference.

Depending on the qualification structure, you can either select the predicted grade from a menu, or use a free text field to type in the grade (see Fig. 43).

If you try to submit an application to UCAS without entering predicted grades for all pending qualifications, a warning message will appear to ask if you are sure you want to submit it.

Your students will not see the reference or predicted grades.

> **Top tips –** To edit the predicted grades of an approved reference, the reference must first be unapproved (see section 7.6).
> – If you return an application to an applicant, to make updates in the education section, any predicted grades you have already entered will be automatically removed. Please make sure you re-enter these grades.

Fig.43: Predicted grades

If you are unable to provide a predicted grade, please leave this blank and make sure your reason is given in the reference.

7.4 Qualifications checked

In the **'Education'** section there is a **'Qualifications checked'** box (see Fig. 44). Tick this if you have checked that the applicant's qualifications details are correct. Leave this blank if you have not.

It is not mandatory to check this box. Universities and colleges will see if it has been ticked.

Fig.44: Qualifications checked

7.5 Adding a reference

In the **'Reference'** section, you can:
> select the name of the referee to appear on the reference (using the drop-down list of staff added in **'Reference contact details'**, see section 5.9)
> write the reference, of up to 4,000 characters. This can also be copied and pasted from another document
> indicate dates when applicants won't be available, if applicable – to discourage universities and colleges from inviting them to interviews, or contacting referees, during holiday periods
> mark a reference as complete to approve it

Top tip – You can view the predicted grades, reference, or application history, in conjunction with any section of the application, e.g. choices, personal statement, education. To do this, use the links on the left-hand side of the screen (see Fig. 45).

You can save changes to a reference and return to it later, without having to mark it as as complete – click **'Save'** and a green banner will confirm the action. Press **'Cancel'** to exit the screen, or **'Clear'** to clear the contents in the reference field. To return to the reference, click **'Edit'** (see Fig. 46).

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

49.

Fig.45: Reference

7.6 Approving a reference

Once a reference is finished, you can **'Mark reference as complete'** (see Fig. 45). This will then display a green **'Complete'** status and give the option to **'Approve'** it (Fig. 46).

Fig.46: Reference updated

An information box will appear, asking you to confirm you want to approve the reference. If you select '**Yes**' a green information bar will be displayed to confirm this is complete.

You can '**Unapprove**' a reference if required (see Fig. 47). A reference must be unapproved if you want to amend the predicted grades.
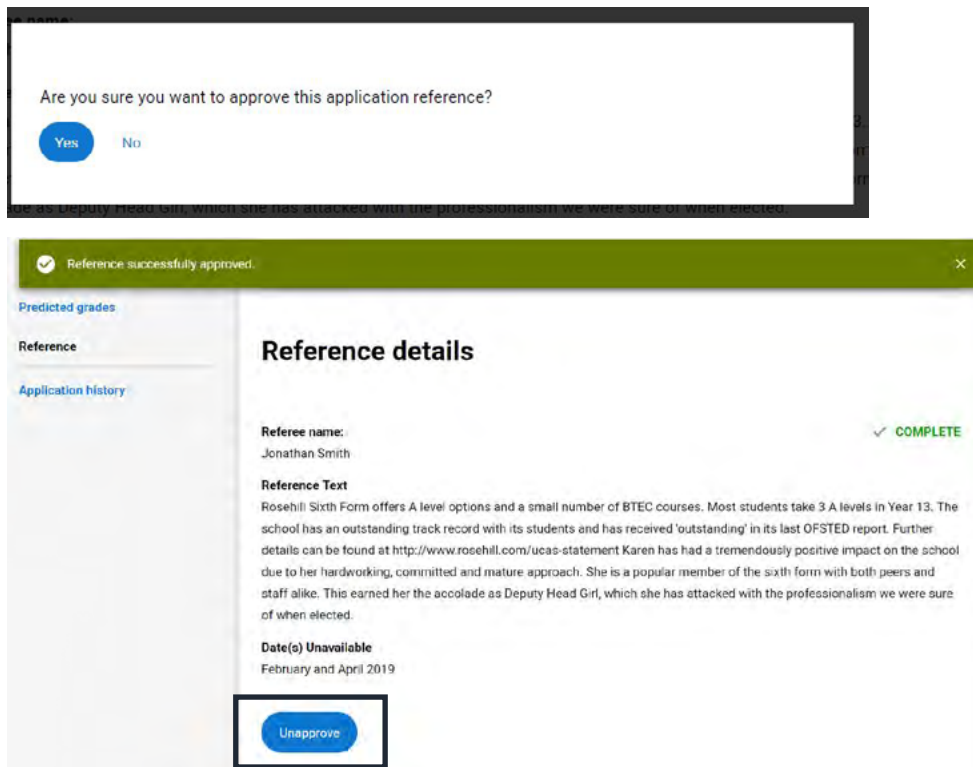
Fig.47: Approve / unapprove reference

7.7 Application history

'**Application history**' is an audit trail that records the date and time key actions have taken place on an application (see Fig. 48).

Fig.48: Application history

SECTION 8:

TRACKING OFFERS AND DECISIONS

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

52.

In the **'Tracking offers and decisions'** section (see Fig. 49), you can:

> view details of your applicants' offer(s)
> view conditions of offer(s)
> view details of your applicants' decisions
> download a real-time Application Status Report

Tracking offers and decisions is:

> only available to staff with the relevant permissions
> available to staff to view at group level permission
> available from the beginning of the cycle in September, when advisers submit applications to UCAS

Data is reflected in real-time – you will see decisions when applicants receive them.

Top tip – We encourage universities and colleges to record all offers in the UCAS system, so we can present the information to both applicants and advisers.

Fig.49: Tracking offers and decisions

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

53.

8.1 Track applications

Fig.50: Track applications

On the '**Track applications**' screen you will see a summary of your applicants' applications once they have been sent to UCAS (see Fig. 50).Use the arrows next to the column headers to reorder the list of applicants, and type in the search boxes at the top of each column to filter the list of applications.

You can use the quick filters at the top of the screen to show applicants who might need additional support. These are:

> received all offers
> no offers received
> unconditional offers received

You can also use '**More options**' to refine your search further (see Fig. 51) – tick the relevant boxes for the filters you want to apply.

The '**Last updated**' column will show you the latest date something changed, or an action was taken on an application, either by the applicant (e.g. changed their choice after submission), or by a university or college (e.g. offer, interview).

Top tip – Remember, applicants must give permission for their application to be visible to your centre post-submission to UCAS. Tracking opt in is completed by ticking a box in the **'Pay & send'** section of their application.

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

54.

Fig.51: More options filter

8.2 Application status

The status column shows the status of the overall application, not individual choices. The statuses are:

> Applicant to reply to revised offer
> Application cancelled
> Eligible for Clearing
> Eligible for Extra
> Eligible for Extra/Clearing/new choice(s)
> Final place accepted
> Has accepted offer(s)
> In Clearing
> No offers: other options available
> Placed through Adjustment
> Ready to send to university/college
> Registered for Adjustment
> University/college to make final decision
> Waiting for Clearing
> Waiting for Extra
> Waiting for applicant's reply
> Waiting for university/college to respond
> Withdrawn from this year's cycle

Please see the Adviser Guide 2020 for an explanation of all of these statuses – it can be downloaded from **www.ucas.com/advisers/guides-and-resources**.

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

55.

Fig.52: Application status summary

Clicking on an individual application row will bring up a summary of the choices. You can view a breakdown of the status for each individual choice (see Fig. 52).

The '**View details**' buttons at the end of each column can be used to view the full status of the application, including full offer conditions (see Fig. 52).

8.3 Track application details

Selecting '**View details**' will display a full record of an individual's application. This will summarise their key information (Personal ID, group, date application was submitted, and their address).

You can also expand the view by clicking on the arrows to see full offer conditions for each individual application choice (see Fig. 53).

Fig.53: Track application details

8.4 Download application data

Click '**Download'** to create an Excel spreadsheet containing **real-time application data** – this is your Applicant Status Report (ASR).

If you want an ASR showing all your applicants, make sure all filters are removed before you click '**Download**'. To remove filters, check all '**Type here**' boxes are empty, all filters in '**More options**' are unchecked, and any quick filters are unchecked (see Fig. 54).

Fig.54: Download

SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

57.

Top tip – If you have filtered the information, only the visible applications will be included in your download.

The downloaded ASR will have two worksheets: **'Choices'**, and **'Final Destination Report'** (see Fig. 55). The first tab is the **'Choices'** report, which will show each applicant choice along with:

> Application Status
> Decision/reply
> Choice status
> Summary of conditions
> Full offer conditions
> Predicted grades
> Year of application
> Year of entry

The second tab is the **'Final Destination Report'** worksheet, which shows where the applicant has been placed.

Once downloaded, to filter the ASR, apply the sort and filter functions in Excel (see Fig. 55). The spreadsheet can also be saved.

Top tip – Remember, the ASR is real-time data and available as soon as applications have been submitted to UCAS.

Fig.55: ASR download

SECTION 9:

DATA AND REPORTING

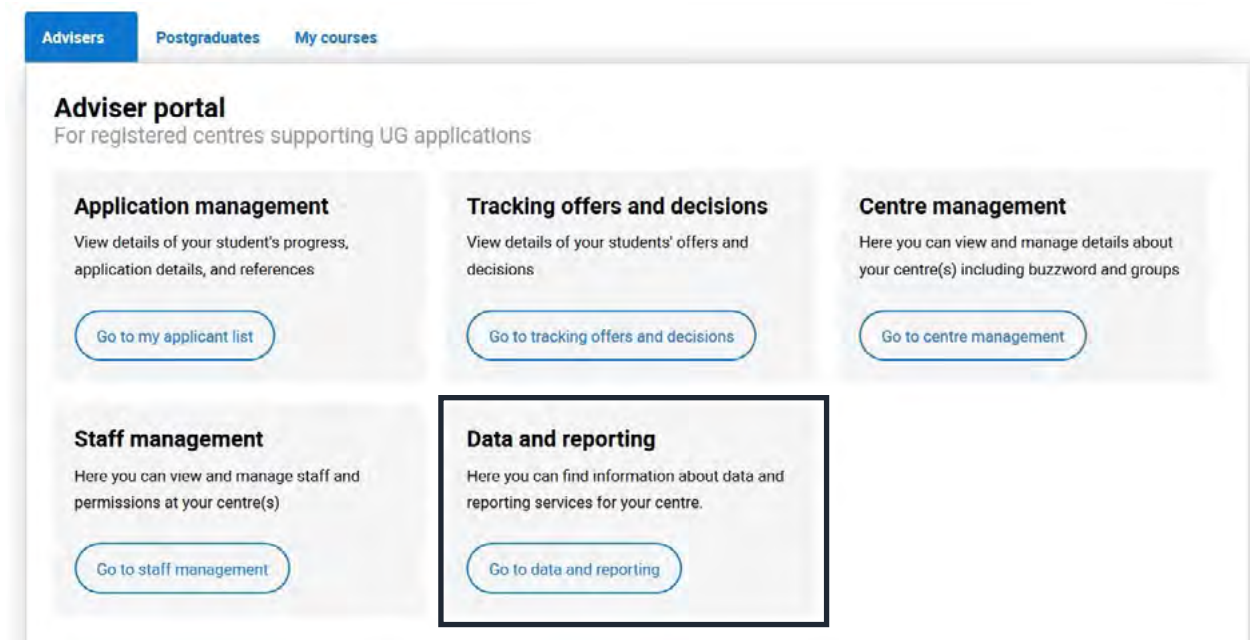| SECTION 1:	SECTION 2:	SECTION 3:	SECTION 4:	SECTION 5:	SECTION 6:	SECTION 7:	SECTION 8:	SECTION 9:
REGISTER ON UCAS.COM	ADVISER PORTAL	SET UP WIZARD	STAFF MANAGEMENT	CENTRE MANAGEMENT	APPLICATION MANAGEMENT	INDIVIDUAL APPLICATION RECORD VIEW	TRACKING OFFERS AND DECISIONS	DATA AND REPORTING

59.

Fig.56: Data and reporting

All staff will be able to access the '**Data and reporting**' section on their dashboard (Fig. 56).

This gives details of reports you can buy – with gold and silver subscription packages available. They are designed to help you with your reporting, IAG planning, and progression monitoring.

All these reports are accessed via our secure file transfer system – if you subscribe, we will send you a link and email confirming the reports are ready to collect, and a second email confirming the password to access them.

> **New – Monthly Key Statistics Report:** Designed to save you time, by providing key statistics about your applicants, their choices, and their offers – all presented in an infographic style for you and your senior leadership team.
> **Progression Report:** Not only shows which university and subjects your applicants have progressed to, but also the offers they received. This combined report also provides you with historical data, and comes in two parts:
>> centre report
>> your centre measured against the sector (combined registered centres)
> **New – Destination Data Map:** Showing where your applicants were placed in the previous cycle. This is an interactive map, with a printable PDF poster.
> **Competitor Report:** Compare your school against a group of five or more competitors of your choice. You can order two competitor reports, if you want to see a variation in where you sit between two groups (e.g. local rankings against national rankings).

Fr more information, visit **www.ucas.com/advisers/managing-applications/data-and-reporting**.

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