INTRODUCING
OUR NEW
ADVISER PORTAL

An adviser's best friend

UCAS

With your help, we've developed our new adviser portal! This service replaces Apply for advisers and Adviser Track, giving you complete oversight of your students' UCAS Undergraduate applications in one system – for free!

It's available now to all UCAS registered centres.

HERE'S WHAT YOU NEED TO KNOW...

WHAT'S NEW

We've listened to your feedback and integrated lots of new features. With a new user interface, improved functionality, and access to real-time data (pre and post-submission), the new service transforms how you manage and track your students' applications.

Here's a quick look at just some of the new and exciting features available to you:

Enhanced sort and filter features	> Date and time order of applications submitted to school/college/centre. > 15 October and 15 January deadlines for applications. > Application status, including 'Returned to applicant'. > Number of applications waiting, in various statuses, that require an action to be taken.
Easier viewing of applications and details	> View an applicant's personal statement while entering a reference. > View an applicant's 'Education' section while entering their predicted grades. > All screens show your UCAS centre number in the top right-hand side. An applicant's Personal ID is also clearly identified.
Improved qualifications shortlist	> Search bar to look up qualifications. > Tick and upload multiple qualifications.
Greater visibility of ex-students	> Select the quick filter 'Linking to centre' to identify ex-students wanting to link to your centre, or requesting a reference. Contact details are also shown.
More options for staff permissions	> Individual's permissions only apply to the group(s) you choose to assign them to. > Permission filter 'Tracking offers and decisions' means staff only see offers and decisions for their relevant groups. > Ability to 'Delete/undelete' applications.
New tracking 'opt in' summary	> Identify which students have ticked the 'Track opt in' tick box and chosen to share details of their application and its progress post-submission.
Enhancements to tracking offers and decisions	> The portal replaces Adviser Track, which means it's now free. > 'Tracking offers and decisions' is available for the full cycle, in real-time. > Select 'Last updated' filter to identify the latest activity on your students' applications. > Use 'Quick filters' to identify those applicants who have either received all offers and need to reply, have no offers, or have received unconditional offers.
Improved Applicant Status Report (ASR)	> Download as and when required, with real-time data. > Download by any filter you require, including groups. > Now includes full details, such as conditions of offers and predicted grades.
New self-service registration and password reset	> Staff generate their own username and password. > They can reset their own passwords, if forgotten.

Top tips

> Our new adviser portal is for 2020 applicants onwards. You will still have to use Apply for advisers to manage your 2019 applicants.

> All the same business rules apply, and nothing is changing for students this year – it's the same application process, same deadlines, and same process to link to you.

Although we've made some big changes, we know there are certain functionalities you can't live without. You will still be able to manage applications, monitor your students' progress, write references, add predicted grades, and approve and submit applications to UCAS on behalf of your students.

To find out more about what to expect, take a look at **ucas.com/adviser-portal**.

WHAT TO EXPECT

Once you've registered and verified your account, each time you sign in you will land on your dashboard.

From here, to navigate to the adviser portal, you'll need to select the **'Advisers'** tab at the top – if it isn't already (see Fig. 1).

On your dashboard, you'll have access to a maximum of five different management tools – your access will depend on the permissions you were given when you were set up as a user.

1. **Application management** – view and manage details of your students' applications, progress, and references.
2. **Tracking offers and decisions** – view details of your applicants' offers and decisions, and download your Application Status Report (ASR).

3. **Centre management** – view and manage details relating to your registered centre(s), including the buzzword, setting payment of application fee, qualifications shortlist, groups, and referee contact details.
4. **Staff management** – view and manage staff at your centre(s) and their permissions.
5. **Data and reporting** – find information about value added, paid for data and reporting services for your centre(s).

Top tip – UCAS registered centre correspondents have access to all five management tools. Your staff's access will depend on the permissions you set them.

From your dashboard, you'll also have quick links to useful information and advice on **ucas.com**. These can be found in the **'Adviser information and advice'** section.
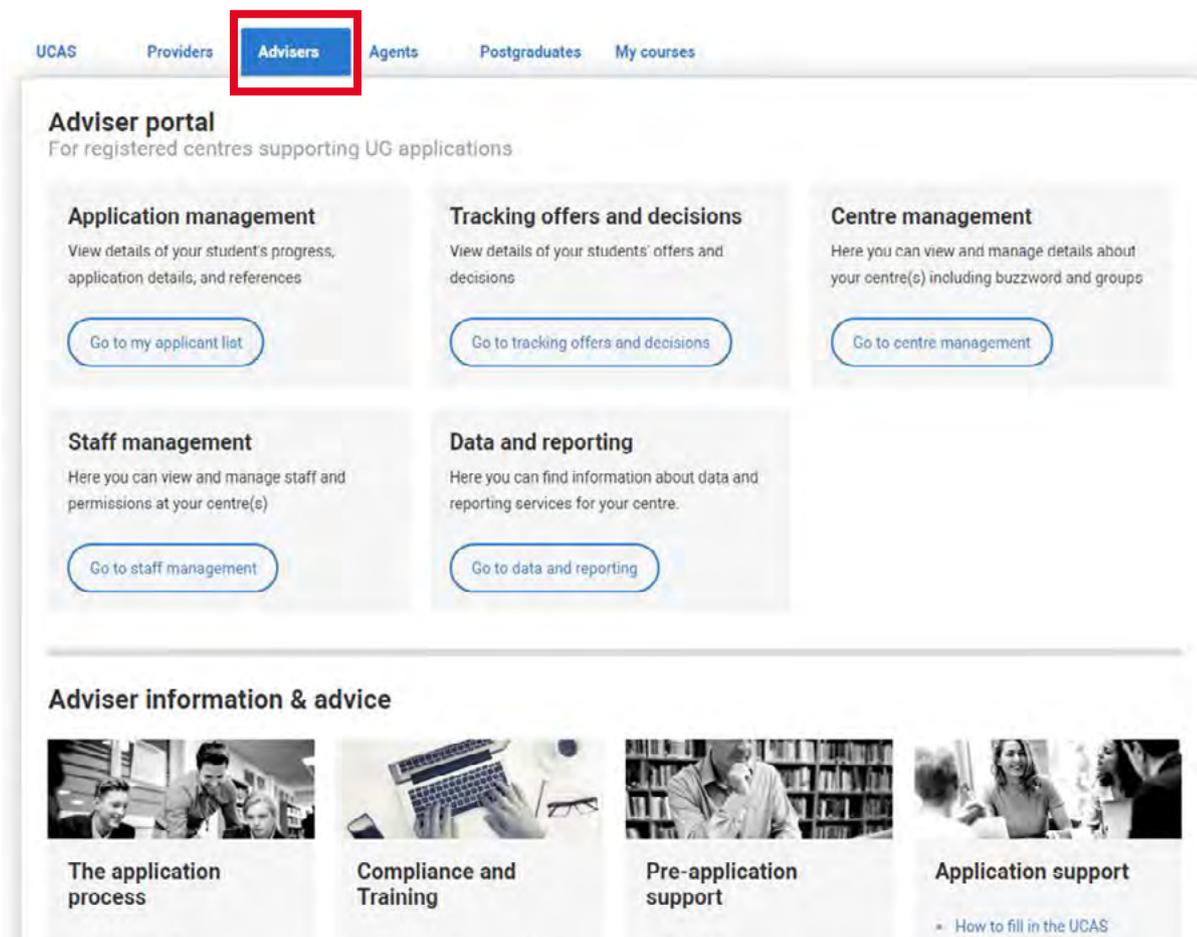
Fig. 1

GETTING STARTED – YOUR ADVISER PORTAL SET UP CHECKLIST

If you're the UCAS correspondent for your centre, here's what you need to do to get started...

For step-by-step instructions on how to complete the below, refer to the relevant sections in our user guide at **ucas.com/adviser-portal-user-guide**.

1. **Register** an account with **ucas.com** (see section 1.1).

2. **Verify** your account (see section 1.3).

3. **Sign in** using the email and password you registered with (see section 2.1).

Top tip – We won't be sending UCAS correspondents a username and password to access their accounts for 2020 – your username is the email address you registered with (this needs to be the same as the one we hold for you), and your password is the one you used when registering.

4. Go to the **'Adviser'** tab on your dashboard (see section 2.2).

5. Complete the initial **'Set up wizard'** (see section 3):
   > Confirm centre details.
   > Set buzzword.
   > Set application fee payment option.

6. Go back to your dashboard and click on **'Staff management'** to (see section 4):

> 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 straightaway. They can then help you complete any actions required.

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7. Go back to your dashboard and click on **'Centre management'** to (see section 5):

> add group names
> add staff to groups
> add referee details
> check and update your qualifications 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 correspondents' accounts and permissions will be set up by UCAS.
> UCAS correspondents will automatically have access to all groups.
> Staff user accounts and permissions need to be set by the UCAS correspondent – we won't be rolling staff over into the new portal.
> All staff will automatically have access to the default group.

FOR MORE INFORMATION:

> visit **ucas.com/adviser-portal**

> view our 'How to register and sign in' video at **ucas.com/adviser-portal/register**

> take a look at our online training modules on **pdp.ucas.com**

> download a copy of our adviser portal user guide – **ucas.com/adviser-portal-user-guide**

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