MASTERCLASS: ADVISER PORTAL

ROSS SANGER, UCAS

UCAS

MASTERCLASS: THE ADVISER PORTAL

Ross Sanger,

Schools and Colleges Success Partner

WE'VE HEARD FROM YOU!

When I login, why can't I see the students I'm supporting?

My details aren't appearing as a referee, how can they be added?

One of my students has said they have linked to us, but I can't find them?

How do I delete an application?

Why am I unable to approve or send an application to UCAS?

I didn't tick the qualifications checked box, what should I do?

STAFF MANAGEMENT

Setting up staff to have access to the Adviser Portal

Student Hub activity

View your students' preparatory activity in the Hub

Go to student Hub activity

Application management

View details of your students' progress, application details, and references

Go to 2024 applicant list

Go to 2025 applicant list

Tracking offers & decisions

View details of your students' offers and decisions

Go to 2024 tracking offers & decisions

Go to 2025 tracking offers & decisions

Outreach Connection Service

Search, find and filter for outreach opportunities

Go to Outreach Connection Service

Centre management

Here you can view and manage details about your centre(s) including buzzword and groups

Go to 2024 centre management

Go to 2025 centre management

Data & reporting

This tool will show you the A level, BTEC and SQA Higher grades students held when they were accepted on to undergraduate courses.

Go to historic entry grades

Your paid for data and reports.

View reports

Staff management

Here you can view and manage staff and permissions at your centre(s)

Go to staff management

Select all

Staff management

☐ Manage staff at this centre

Centre management

☐ Manage this centre's details

☐ Manage groups at this centre

Application management

☑ View applications

☑ Approve applications

☐ Send to UCAS

☐ Delete and undelete applications

☑ View references

☐ Edit references

☑ Approve references

Tracking offers and decisions

☐ View offers and decisions

Data reports

☐ View data reports

Hub reporting

☐ View Hub reporting

CENTRE MANAGEMENT

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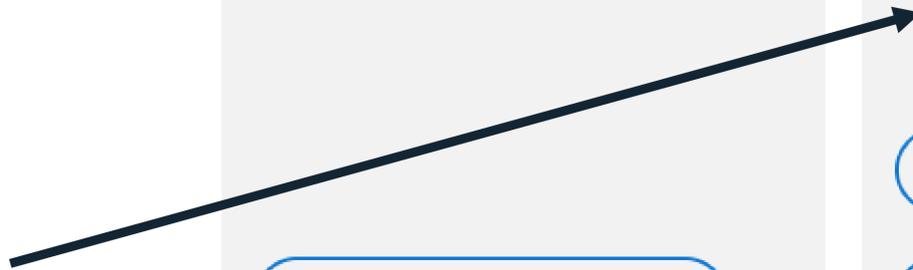
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Public

23

UCAS

Groups

Add/remove multiple groups for staff

Add new

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

Click an arrow to expand a group, to see the students and staff members who are assigned to it. Click 'Edit' to update a group name, or to add or remove students and staff members. Edit is only available when you have more than just the 'Default Group'.

Staff must be assigned to groups to view and manage applications. Permissions to view, manage, and submit applications and references are controlled in staff management. A staff member's permissions will be the same for each group they are assigned to.

EXPAND ALL   COLLAPSE ALL

▶ Default Group   Edit

▶ Ex-Students   Edit

▼ Miss Taylor TG   Edit

Student members ?	Staff members ?
Glen Stuart	Finlay Willicott
Jude Peters	Rose Hill

▶ Mr Roberts TG   Edit

▶ Mr West TG   Edit

Groups

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EXPAND ALL   COLLAPSE ALL

▶ Default Group   Edit

▼ Ex-Students   Edit

   This group currently has no members

▶ Miss Taylor TG   Edit

▶ Mr Roberts TG   Edit

▶ Mr West TG   Edit

▶ Mrs Harrison TG   Edit

CENTRE MANAGEMENT

My details aren't appearing as a referee, how can they be added?

Centre and reference details

Contacts

Centre linking (buzzword)

Qualification shortlist

Groups

Application fee payment methods

Referee contact details

Reference template

Referee contact details

Add referees for your centre, and their contact details. When adding a reference to an application, information to contact the referee if needed. When adding a new referee, contact details will be co

EXPAND ALL   COLLAPSE ALL

▶ Anabelle Cooper

▶ James Smith

▶ Jonathan Smith

▶ Matthew Franks

▶ Ross Sanger

Referee contact details

Add referees for your centre, and their contact details. When adding a reference to an application, the names listed below will be available to choose from. Universities and colleges will use the below information to contact the referee if needed. When adding a new referee, contact details will be copied from the 'Centre and reference details' tab, which you can overwrite if needed.

EXPAND ALL   COLLAPSE ALL

▶ Anabelle Cooper

▶ James Smith

▶ Jonathan Smith

▶ Matthew Franks

▶ Ross Sanger

▶ Matthew Franks

▶ Ross Sanger

▼ Sam Sykes

Name to appear on reference
Sam Sykes

Occupation
Lead for Schools and Colleges

Email
training@ucas.ac.uk

Phone
0871 468 0468

Centre name
UCAS Training School

Address
Rosehill
New Barn Lane
Cheltenham
GL52 3LZ

Edit   Delete

CENTRE MANAGEMENT

One of my students has said they have linked to us, but I can't find them?

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Buzzword

The buzzword is a unique term you can give to applicants who are applying

Students will be asked 'Are you applying from a school, college, or centre?' application without linking to a centre, they can add a buzzword in their app

You can pick a new buzzword at any time in the cycle. Remember to let you

Your buzzword is currently: ❓

TRAININGSCHOOL2025

Link applicants to centre

The following applicants have requested to be linked to your centre

TOP TIPS - SET UP

- Create groups – remember students can pick the group at the point of application

- Set your unique buzzword for students to link*

- Set/review the application fee payment options

- Review and ensure your qualification shortlist is correct

- Check group permissions for individual staff members

- Keep your contact details up to date

*REMEMBER - it matters where the student inputs the buzzword to be linked automatically without having to accept individual requests

Centre management 2025

UCAS Training Glasgow

UCAS centre number: 19439

1 — 2 — 3 — 4

Next

Set up your centre

You must set up your centre before you can begin linking with your applicants. Please ensure that you are authorised to register the new cycle for your centre.

1 Confirm details for referees

2 Select application fee payment option

3 Set up buzzword

Sam's dashboard

Discover   Undergraduate   Postgraduate   Money & student life   Apprenticeships   Careers

Sam

Adviser portal
For registered centres supporting UG applications

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Careers

Sam

Sam
Edit your Account

Adviser Homepage

Adviser Portal

Student Hub

Sign out

Student Hub activity

UCAS Training School

UCAS centre number: 19048

Found 8 Hub users

All years of entry
2023 entry
2024 entry
2025 entry
2026 entry

⇕ First name	▲ Last name	⇕ Intended year of application	Other schemes	Subjects	⇕ L
Type here	Type here		Type here	Type here	Type here
██████	██████	2025	Apprenticeships	Accounting and finance Biology Computer science	18 May 2024 09:47
██████	██████	2025	Apprenticeships	Accounting and finance Health Hospitality, leisure, and tourism	13 Mar 2024 15:04
██████	██████	2025	Conservatoires	Health Nursing Social work, childhood, and youth studies	28 Mar 2024 15:23
██████	██████	2025		Chemistry Criminology Policing	20 May 2024 14:21
██████	██████	2025	Apprenticeships	Civil engineering Environmental and earth sciences Medicine	20 Feb 2024 20:01
██████	██████	2025		Art Building and construction English language	15 May 2024 17:08
██████	██████	2025	Apprenticeships	Agriculture and related sciences Civil engineering Engineering and technology	27 Apr 2024 16:14

UCAS

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Your Hub
Explore your options

Hub   For you   Favourites   What to do   Where to go   Search

S **Welcome back Sam**
You're applying for Undergraduate courses in 2025 - Change year

⊕ Start application

2025 Application

Start an application
Apply to universities and colleges to study degrees, HNDs, and HNCs and dance, drama and music at conservatoires.

Start application ⊙

DISCOVER WHAT TO DO
Browse subjects and careers with related courses and apprenticeships.
Discover more

FAQS
What subject should I take?
Read our subject guides to see what might be right for you.

FOUND A COURSE YOU LIKE?
Find out more >
UCAS Apprenticeship

DISCOVER CAREERS
Try our quiz and get recommended careers that match your skills and personality traits.
Take the quiz

FAQS
Key application dates
Find out what you need to do and when.

DISCOVER WHERE TO GO
Browse universities, colleges and employers and learn more about cities and regions in the UK.
Find out more

HOW TO
How to apply
All you need to know about applying to university, college or an apprenticeship.

FIND AN APPRENTICESHIP
Learn more >
UCAS

HOW TO
How to nail that personal statement
Writing a personal statement can be daunting. Follow our tips and advice to help make it easier.

What's happening

Replying to your offers - your questions answered
Getting ready to reply to your offers? We've got all your questions answered
More info

Chat to students
Chat with UK and international students who are already studying the courses you've applied for at universities and colleges across the UK on Unibuddy
More info

University course tasters
Experience what a university course would be like with Springpod's Subject Spotlights. These interactive, virtual university course tasters feature real-life lectures, seminars, and academics.
More info

Live now: Studying in the UK
There's a lot to consider when moving to a new country. We explore accommodation, visas, scholarships and everything in between.
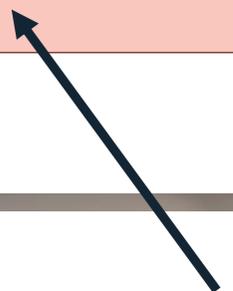More info

Careers   Sam

Sam
Edit your Account

🏠 Adviser Homepage

📊 Adviser Portal

👥 Student Hub

⏻ Sign out

APPLICATION MANAGEMENT

Supporting your students and their applications

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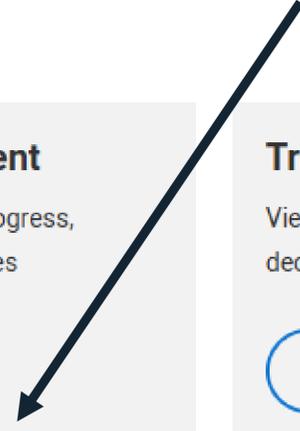
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35

Student details   Status   Section progress

◆ First name	◆ Last name	◆ Date first submitted	◆ Resubmitted date	◆ Group	◆ Deadline	◆ Application status	◆ Reference status	◆ Personal ID	◆ Payment option	◆ Select
Type he	Type he	Type her	Type here	Type he	Type here	Type here	Type here	Type here	Type here	All / none
Gillian	**Adams**			Mr West TG		In progress	Awaiting approval	2050004904		☐
Pippa	**Andrews**			Mrs Harrison TG		In progress	Not started	2050005008		☐
Matthew	**Drury**			Mrs Harrison TG		In progress	Not started	2050007206		☐
Nikki	**Green**			Mr West TG	Oct 2024	In progress	Not started	2050019906		☐
Claire	**Greening**			Mr West TG		In progress	Approved	2050005503		☐
Rose	**Hill**			Mr Roberts TG		In progress	Not started	2050005200		☐

I didn't tick the qualifications checked box, what should I do?

▼ **Education**   COMPLETE ✓

☑ **Qualifications checked**

UCAS Training School September 2023 - July 2025

National centre number:

Type of study: Full time

Study mode: In person

GCE Advanced Level (A-Level)

English

**Grade:**   **Date:** July 2025   **Awarding body:** AQA

UCAS

Student details | Status | Section progress

⬍ First name	⬍ Last name	⬍ Date first submitted	⬍ Resubmitted date	⬍ Group	⬍ Deadline	⬍ Application status	⬍ Reference status	⬍ Personal ID	⬍ Payment option	⬍ Select
Type h	Peters	Type her	Type here	Type he	Type here	Type here	Type here	Type here	Type here	All / none
Jude	Peters			Miss Taylor TG	Jan 2025	In progress	Not started	2050004702		☐
Rosie	Peters			Mrs Harrison TG		In progress	In progress	2050005604		☐

Public
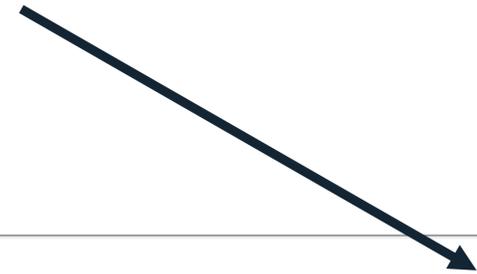
Reference

If a staff member at your centre has entered reference template text in 'Centre management', you can add this to the reference using the button below. This will be included within the character count for the reference.

Add reference template text ⟵

There is a limit of 4000 characters; including spaces, section headings and line breaks all of which take up at least one character; this means that your entered text will need to be under 3800 characters. Bold, italics and underlining cannot be used in the reference. Character counts may differ if your input has been pasted from another electronic source and/or you have entered non-English characters and/or symbols such as £, €, among others.

See further guidance on writing references. ☐

Enter a general statement about your school/college/centre. *

UCAS College is an open access sixth form institution with a full-time student body of c.2,000. We recruit primarily from the borough's varied comprehensive schools, but also attract students from further afield. Level 3 students undertake 3 A levels or applied general equivalents, together with an enrichment programme. We offer a wide range of BTEC and Cambridge Technical courses at all levels. A number of our university applicants will have enrolled on Level 2 programmes with us before embarking on study at Level 3. We base predicted grades on end of first year exams where available, alongside internal assessments and a range of other work students have completed.

Characters used here: 698, remaining overall: 3302

41

☑ **Mark reference as complete**

Predicted grades ❓

UCAS Training School

BTEC Certificate in (Mathematical Applications)

Awarding body:	BTEC
Certification date:	May 2024
Level:	1
Predicted grade:	Pass

Save   Cancel

▼ Reference & predicted grades

Reference details

Referee name:

Ross Sanger

Reference

ESTABLISHMENT DETAILS

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UCAS Training School

BTEC Certificate in (Mathematical Applications)

Level: 1

Predicted grade: Pass

Certification date: May 2024

Awarding body: BTEC

Edit   Approve

How do I delete an application?

Student details	Status	Section progress

⬍ First name	⬍ Last name	⬍ Date first submitted	⬍ Resubmitted date	⬍ Group	⬍ Deadline	⬍ Application status	⬍ Reference status	⬍ Personal ID	⬍ Payment option	⬍ Select
Type he	Type he	Type he	Type here	Type he	Type here	Type here	Not starte	Type here	Type here	All / none
Pippa	**Andrews**			Mrs Harrison TG		In progress	Not started	2050005008		☐
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Rose	**Hill**			Mr Roberts TG		In progress	Not started	2050005200		☐
Glen	**Millman**			Default Group		In progress	Not started	2050363001		☐

TOP TIPS - IN PROGRESS APPLICATIONS

▪ Return to applicant message – use the space provided

  - Students receive an email containing your message and a prompt to sign in to their application

  - Your message is also on their application when they sign in

  - **Save your message in the 'Adviser Notes' to refer to them**

▪ If changes are made by applicant in the education section, predicted grades will need to be added again.

▪ Check regularly for applicants that have linked after registering in the 'Application summary' tile.

Application summary

Applications managed by your centre

Total applications
8

Filter applications

In progress	▼	8
Ready to send	▼	0
Sent to UCAS	▼	0

| Waiting to link to centre | 1 |

RESUBMITTED DATE COLUMN

Found 4 applications

••• Select action   ••• Download

Student details   Status   Section progress

First name	Last name	Date first submitted	Resubmitted date	Group	Deadline	Application status	Reference status	Personal ID	Payment option	Select
Type h	Type here	Type her	Type here	Type here	Type here	Type here	Type here	Type here	Type here	All / none
Haruto	▓▓▓	11 Mar 2024 11:27	11 Mar 2024 13:22	Venison Group	Oct 2024	Awaiting approval	Not started	▓▓▓	Invoice	☐
Roger	▓▓▓	28 Feb 2024 08:11	11 Mar 2024 10:33	▓▓▓	Oct 2024	Awaiting approval	Not started	▓▓▓	Invoice	☐
martell	▓▓▓	01 Mar 2024 00:00	08 Mar 2024 14:21	Default Group	Jan 2025	Awaiting approval	In progress	▓▓▓	Invoice	☐
Kinzer	▓▓▓	27 Feb 2024 14:34		Default Group	Oct 2024	Awaiting approval	Not started	▓▓▓	Invoice	☐

LINK TO COURSE ENTRY REQUIREMENTS

UCAS

▼ Choices   COMPLETE ✓

Nursing (Adult) (B740)

████████████

Campus: Ormskirk (Main Campus)

Start date: January 2024

Point of entry: Year 1

Live at home while studying: Yes

Deferred entry: No

Criminal convictions: Declared

Further details: Some text

Course information

ⓘ **You may need to take an admissions test**

As part of the application process for this course you may need to sit the following admissions test: Healthcare Professions Admissions Test (HPAT)

ⓘ **There may be an assessment**

You may be required to attend an interview or audition, or provide a portfolio, essay, or other piece of work to help the tutor decide if you're suitable for this course.

Course entry requirements⧉

Applied Sciences (Biology) (C100)

████████████

Campus: Main Site

Start date: January 2024

Point of entry: Year 1

Live at home while studying: Yes

Deferred entry: No

Course information

ⓘ **You may need to take an admissions test**

As part of the application process for this course you may need to sit the following admissions test: University Clinical Aptitude Test (UCAT)

Course entry requirements⧉

FOLLOW YOUR PROGRESS

- Check the Adviser progress status bar for every student.

- Once everything has been ticked, it can be sent to UCAS.

Adviser progress

Application complete ✓

Qualifications checked ✓

Predicted grades complete ✓

Reference complete ✓

Reference approved ✓

Application approved ✓

Sent to UCAS

UCΛS

50

TOP TIPS - POST SUBMISSION APPLICATIONS

- **Applicant Status Report** – by using the filters on screen you can tailor your ASRs.

- ASRs have **full conditions of offer** as well as your students' predicted grades.

- Adviser Guide outlines abbreviations and symbols used by providers in their summary offers.

- **Bulk download** your applications in one cohort.

Placement summary

Active applications

Total applications
185

Filter applications

Unplaced	185
Placed insurance choice	0
Placed firm choice	0

SUPPORTING APPLICANTS POST SUBMISSION

First name	Last name	Group	Status ❓	Application reply deadline ❓	Personal ID	Last updated	Send email
Type here	Type here	Type here	change	Type here	Type here	Type here	All / none
███	███	███	Final place accepted ⚠️ Course change		███	15 Aug 2024	☐
███	███	███	Final place accepted ⚠️ Course change		███	15 Aug 2024	☐

First name	Last name	Group	Status ❓	Application reply deadline ❓	Personal ID	Last updated	Send email
Type here	Type here	Type here	**Delay**	Type here	Type here	Type here	
███	███	Mr Smiths Group	Has accepted offer(s) ⚠️ **Confirmation Delay**		███	27 Mar 2023	☐
███	███	Mr Smiths Group	Has accepted offer(s) ⚠️ **Confirmation Delay**		███	06 Mar 2023	☐

STUDENT OPT IN

Don't forget!

If you can't view your students in the tracking area of the Adviser Portal, they may have opted out of sharing data.

Students can change this themselves in their application.

Public

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OUR SUPPORT

UCAS' Adviser Help Team
0345 123 8001
adviserhelp@ucas.ac.uk

Digital Learning Team
training@ucas.ac.uk

Professional Development Platform
https://pdp.ucas.com

UCAS

ANY QUESTIONS?