Application Management

1) What is the Application Stage?

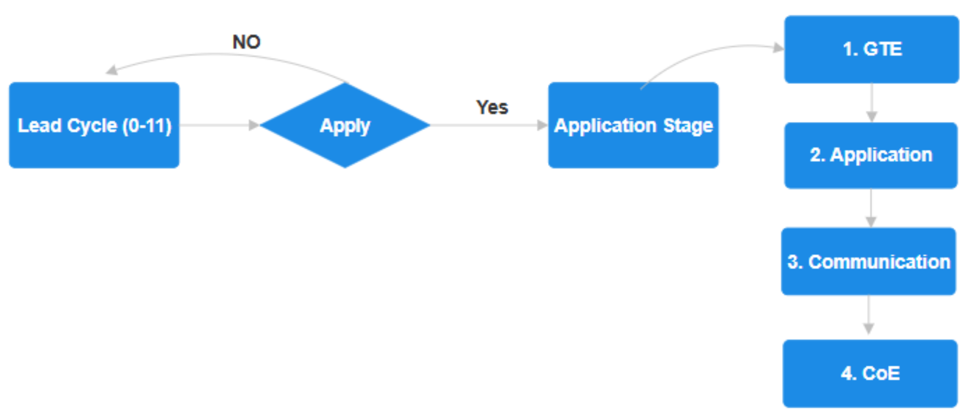
The Application Management process begins once a student's profile has successfully moved through all the required stages in the Lead Cycle and is transitioned into the Application Stage. Once a Counsellor has completed all required fields and stages in the Lead Cycle, they can initiate the transition to the Application Stage by clicking the **"Apply"** button. This action finalizes the lead as an applicant and forwards the profile to the **Admission Team** for further processing.

The Application Stage is managed by the Admission Team Members, who are responsible for overseeing the full application lifecycle. This stage consists of four major processes the Four Process are 1) GTE 2) Application 3) Communication 4) CoE, each critical to progressing the student's application towards enrollment.

Roles & Responsibilities

Role	Responsibility
Counsellors	Manage student information through the Lead Cycle and initiate applications.
Admission Team	Handle all stages of the Application process, including documentation, compliance checks, institution liaison, and enrollment.

System Flow Summary



2) Description of the four processes of Application Stage?

Major processes of the Four Process are 1) GTE 2) Application 3) Communication 4) CoE

Admission Team has Individual Team Responsible for Each Process.

1) GTE Process

The Genuine Temporary Entrant (GTE) Process is the first critical step in the Application Stage. This process is managed by a dedicated GTE Team within the Admission Team, which is responsible for ensuring that each application meets the necessary documentation and compliance requirements before proceeding further.

GTE Team specifically overseeing the validation of all documents related to the GTE criteria. GTE Team members review each application carefully to confirm that the applicant's documents comply with the requirements set by the respective education providers and regulatory authorities.

Process Workflow

1. **Document Verification:**
   The GTE Team checks the RDS repository to verify whether the Counsellor has uploaded all mandatory documents required for the application.

2. **Completeness Check:**
   a. If all required documents are present and verified, the application is approved to move forward into the Application Process stage.
   b. If any documents are missing or incomplete, the GTE Team raises a task in the CRM system, specifying the exact documents or information needed.

3. **Follow-up and Resolution:**
   a. The Counsellor is notified via the CRM task to provide the outstanding documents.
   b. This loop continues until the GTE Team confirms that all documentation is complete and satisfactory for submission.

2) Application Process

Once the application successfully passes the GTE stage, it progresses into the Application Process, which is managed by the Admission Team. This phase focuses on careful preparation and submission of the application to the chosen education provider.

- The team verifies that all student data and supporting documents meet the specific requirements of the institution.
- Application forms are completed accurately, ensuring that every necessary detail is included to avoid delays or rejections.
- The Admission Team monitors the application status closely, maintaining regular communication with the institution to address any additional document requests or clarifications.
- This stage continues until the Admission Team receives an Application ID from the institution.
- Upon receipt of these, the application is then forwarded to the Communication Stage for further processing.

This process is essential to secure a timely and successful application outcome, setting the foundation for the subsequent stages.

3) Communication Process

Effective communication is vital throughout the Application Stage. The Communication Process ensures clear, timely, and transparent exchanges between all stakeholders involved.

- Once the Conditional Offer Letter (COL) is received by the Admission Team, the application is passed to the Communication Team.
- The Communication Team takes full responsibility for all interactions with the education provider from this point onward.
- They relay the Conditional Offer Letter to the Counsellor and coordinate with the student to ensure all conditions outlined in the COL are fulfilled.
- The team manages the collection and submission of all additional documents requested by the provider as part of the COL requirements.

- Regular updates on application progress are communicated to the students, counsellors, and relevant team members to maintain transparency.
- The Communication Team maintains detailed records of all correspondence, including emails and CRM logs, for auditing and reference purposes.
- Once all conditions are met and the Full Offer Letter is received from the provider, the application is then forwarded to the CoE Team for final processing.

4) CoE Process (Confirmation of Enrollment)

The **Confirmation of Enrollment (CoE) Process** is the final and crucial step in the Application Stage. It confirms the student's official acceptance by the education provider and enables the student to proceed with visa applications and enrollment formalities.

- After receiving the Full Offer Letter, the **CoE Team** takes ownership of the application.
- The team ensures that the student meets all requirements stipulated by the institution, including fee payments and submission of any outstanding documents.
- The CoE Team liaises directly with the education provider to facilitate the timely issuance of the CoE.
- Upon receipt, the CoE is verified and securely uploaded to the system for record-keeping and future reference.
- The team maintains close communication with the students and counsellors to support subsequent steps such as visa processing and pre-departure preparation.
- Efficient management of the CoE Process is vital to avoid delays that may impact on the student's admission timeline and visa approvals.

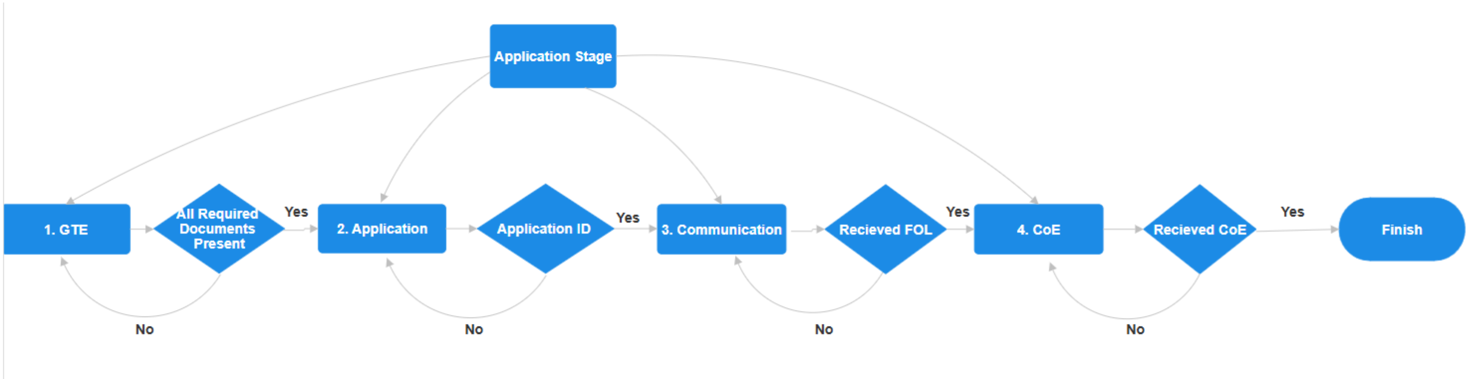
This final step solidifies the student's admission status and ensures compliance with institutional and immigration requirements.

Summary

Process	Description	Key Responsibilities	Outcome / Next Step
1) GTE Process	The GTE Team verifies that all required student documents are uploaded and meet criteria for the application. Using Remote Desktop Service (RDS), they check documentation completeness. If documents are missing, tasks are created in the CRM to request them from the Counsellor until complete.	Verify documents in RDS; raise CRM tasks for missing documents; approve readiness for application submission.	Application moves to Application Process.
2) Application Process	The Admission Team prepares and submits the application to the education provider, ensuring all data and documents comply with requirements. They track application status and handle additional document requests Until Application ID are received.	Complete and submit application; track status; coordinate document requests; obtain COL and Application ID.	Application passes to Communication Process.
3)Communication Process	After receiving the COL, the Communication Team manages all	Manage communication provider; update	Application moves to CoE Process.

Process	Description	Key Responsibilities	Outcome / Next Step
	communication with the provider. They pass the COL to the Counsellor and coordinate with the student to fulfill all conditions, submitting required documents until the Full Offer Letter is obtained. All correspondence is logged for transparency.	student and counsellor; collect and submit documents; maintain communication records.	
4) CoE Process	The CoE Team ensures all final requirements (fees, documents) are met and liaises with the provider to obtain the Confirmation of Enrollment. The CoE is verified, uploaded, and used for visa and enrollment processes. The team supports the student through final admission steps.	Verify final requirements; liaise with provider; upload CoE; support visa/enrollment preparation.	Student confirmed for enrollment; process ends.

Flow Chart of Admission Four Process



3) Required Documents per Application Process for Each Process

Each stage of the Application Process requires specific documents to ensure compliance with institutional and visa requirements. The table below outlines the documents needed for each of the four main processes:

Process	Required Documents
1) GTE Process	1) Passport 2) Academic Documents: • Year 10 & Year 12 (mandatory for Bachelor & Master applicants) • Bachelor's degree transcripts (mandatory for Master applicants) 3) Gap Documents (if applicable) 4) Critical Documents (as per university requirements) 5) English Proficiency Documents (IELTS/PTE/etc.) 6) English Document Verification (for offshore applicants) 7) Job Documents (for Master’s applicants) 8) Major Confirmation (case-by-case) 9) Marriage Certificate (if married) 10) StudyNet Declaration 11) F 31.4 Form
2) Application Process	Same As GTE Process Documents
3) Communication Process	1) GS and Financial Documents (as per university requirements) 2) Critical Documents (as per university requirements)

	3) Any documents specifically mentioned in the Conditional Offer Letter (COL)
4) CoE Process	1) Signed Offer Letter 2) OSHC (Overseas Student Health Cover) Confirmation 3) Payment Proof (Tuition fee or deposit as required by the institution)

Notes:

- All documents must be uploaded to the RDS in the appropriate folder structure.
- Any missing documents at any stage will result in delays and a task being raised in the CRM for follow-up.

4) What are the roles and responsibilities in Application Stage?

Structured with multiple layers of oversight and execution to ensure efficient handling of student applications. Each role contributes uniquely to the application lifecycle, from document collection to final enrollment.

Role	Responsibility
Admission Team Manager	- Provides strategic leadership across the Admission Team. - Oversees project execution and cross-functional initiatives. - Leads training and development initiatives. - Makes final decisions on escalated or critical cases. - Aligns team performance with organizational goals.
Admission Team Leader	- Manages overall team operations and workflows. - Supports execution of admission processes. - Ensures timely and quality task completion. - Escalates unresolved issues to the Manager. - Acts as a bridge between operational staff and upper management.
Assistant Team Leader	- Monitors daily operations and project timelines. - Oversees task distribution and follow-up. - Assists Team Leader with workflow coordination. - Ensures adherence to process documentation and policies. - Takes charge in the absence of the Team Leader
Team Supervisor *(1 per team: GTE, Application, Communication, CoE)*	- Supervises the work and performance of team members. - Conducts document reviews and quality checks. - Offers real-time support to team staff. - Identifies process gaps and reports to leadership. - Ensures compliance with internal SOPs.

Senior Admission Officer	- Handles high-priority or complex student applications. - Provides mentorship to Admission Officers. - Maintains contact with providers for escalated queries. - Verifies document accuracy and completeness. - Reports on recurring issues or trends.
Admission Officer	- Processes applications through all stages (GTE, Application, Communication, CoE). - Coordinates with students and counsellors. - Uploads and checks required documents. - Updates CRM task status and follows up on incomplete steps. - Maintains strict timeline adherence.
Counsellor	- Acts as the main point of contact for the student in the early stages. - Responds to CRM tasks raised by Any four Admission Team for additional documents or clarifications.

5) Application Stage – Email & SMS Templates

i) GTE TEAM Email Templates

Template – GTE Approved, Awaiting Full Offer

Dear Concern,

GTE has been approved. To proceed with the unconditional offer, we need the following documents:

• SOP (DHA Guidelines)
• Financial Documents
• Verified English Score
• Interview (if required)

ii) Application TEAM Email Templates

a) Template 1 – Submission Confirmation (No Action Needed)

Dear Applicant, Good day! DO NOT REPLY – for your information only. Congratulations, your application has been submitted successfully. Application ID: [XXXXXX] Once we get an update from the University, we will notify you directly. Thank you for your cooperation.

b) Submission with Required Documents

Dear Applicant, Good Day! No need to reply – just to inform you. Your application has been submitted. Application ID – [XXXXXX] However, we still require the following documents: • Financial documents • SOP (according to DHA guidelines) • Interview (if required) If you've already submitted these, kindly ignore. Otherwise, please contact your counselor or send the documents to this email.

C) Document Request

Dear Partner/Student, **Please reply directly to the sender and CC as attached in the email, with an exactly matching subject line.**

Please provide the following documents/information at your earliest convenience: **• [Document 1]** **• [Document 2]** **If you need assistance, do not hesitate to contact us.**

D) Application Withdrawals & Refunds

Subject: Application Withdrawal Request **Dear Admissions,** **Good day!** **This is to inform you that the student wishes to withdraw the application for personal reasons. Kindly withdraw the application.** **Thank you for your cooperation.** **Kind regards,** **[Your Name]** **Admission Team** **StudyNet Pty Ltd**

E) Template – Deferral

Dear Admissions, **Good day! I trust this email finds you well.** **We would like to request deferral of the student's application to the next available intake. Kindly issue a new offer letter.** **Hope to hear from you soon.** **Kind regards,** **[Your Name]** **Admission Team** **StudyNet Pty Ltd**

iii) Communication Process Email Templates

Template – COL Received, Awaiting Full Offer

Dear Admissions Team, Good day! We would like to inform you that the student has provided the required documents as per your offer conditions: • [Document List] Please review the documents and issue the full offer letter. Thanks for your cooperation.

iv) CoE Team Email Template

1) CoE Sent to Student

Subject: Your CoE is Ready Dear [Student Name], No need to reply – this is for your acknowledgment. Please find the attached Confirmation of Enrolment (CoE). Refer to the email below for further details. Kind regards, [Your Name] Admission Team StudyNet Pty Ltd

2)Template – CoE Payment Clarification

Dear Team, Greetings! Thank you for the offer letter. However, there is a discrepancy between the conditional offer and final CoE amount. Attached is a screenshot for your reference. Could you please clarify the tuition fee difference or issue a revised CoE? Thank you!

3) Agent Change Notification

Dear Admissions Team, The student wishes to nominate StudyNet Pty Ltd as their official agent and has submitted an agent change request. Kindly acknowledge and continue application assessment under our agency. Let us know if you require any documentation. Warm regards, [Your Name] StudyNet Pty Ltd

6) CRM Navigation Path – Application Stage Process

Description:

To manage and update the status of student applications in the CRM system, follow the steps below. This navigation path allows the Admission Team to access, monitor, and update the progress of an applicant through the GTE, Application, Communication, and CoE stages.

I. After logging into the CRM:

II. Dashboard View will be displayed.

III. On the left-hand sidebar, locate and click on the “Applications” menu.

IV. This opens the Application Search Page, where you can enter the CRM ID in the search bar.

V. After entering the CRM ID and hitting search, the corresponding application record will appear.

VI. Click on the application to access the applicant's profile page.

VII. Inside the profile, select the "Process" tab.

VIII. This will open the Application Process Page, where you can:

a. View the current application stage (GTE, Application, Communication, CoE).

b. Update the process status (e.g., mark GTE as "Finished" and move it to the next stage).

c. Add comments or notes if required for documentation or follow-up.

IX. The Admission Team uses this interface to progress the application through each phase by marking them completed and advancing to the next step based on documentation and communication status.

Application Stage Process Path

Dashboard → Left Sidebar → Applications → Search by CRM ID → Click on Application → Profile → Process Tab → Update Stage Status

7) Common Issues at the Application Stage & Recommendations

During the Application Stage, several challenges can arise that impact the efficiency and success of processing student applications. They are given below with a solution.

Issue	Description	Solution
Missing Documents	Often, GTE or Application teams find that required documents are not uploaded by the counsellor.	Ensure counsellors strictly follow the required document checklist before moving a lead to the application stage. Implement validation rules or mandatory fields in CRM.
Incorrect Application Submission	Application submitted with incorrect or incomplete data leads to rework or rejection.	Double-check all fields before submitting. Use a standardized pre-submission checklist. Have a

		second officer verify high-priority submissions.
Delayed Responses from Institutions	Providers may delay updates, which holds back the offer or processing.	Maintain regular follow-ups using email templates. Use follow-up tracking in CRM. Escalate to provider contacts if no response within SLA.
Communication Gaps	Miscommunication between counsellor, admission team, and provider causes delays or errors.	Keep all communication logged in CRM. Use shared notes and update status tags regularly. Hold weekly syncs between teams.
Wrong Document Format or Naming	Providers may reject documents not named/formatted properly	Train all staff to follow naming conventions. Use templates and upload guides. Automate filename formatting where possible.
English Proficiency Documents Not Verified	Offshore applicants may miss PTE/IELTS verification snapshots.	Make English document verification a mandatory GTE checklist item. Maintain a SOP on verifying results from test portals.
Conditional Offer Misunderstanding	Counsellors may misinterpret conditions mentioned in COL.	The communication team should highlight each condition and explain to the counsellor. Use email templates for clear instructions to students.
CRM Status Not Updated Timely	Team members forget to update status, causing confusion or missed steps.	Implement internal reminders and CRM flags. Team leaders should review application status reports weekly.
Wrong Major Selected or Misalignment with Documents	Application gets delayed or rejected if major doesn't match with SOP or academic background.	Counselors must confirm major before GTE submission. The admission team must review SOP and documents for alignment.
COE Delay Due to Commission Issues	Sometimes CoE is received but not processed in CRM due to pending commission addition.	Ensure finance/commission team is notified immediately when CoE is received. Tag them in CRM and follow up actively.

8) Rejection or Withdrawal Handling

There are scenarios where an application may need to be withdrawn by the applicant or rejected by the institution. To ensure that these cases are tracked, processed, and documented properly, the CRM provides a structured method for recording both outcomes.

When to Use This Process

- **Withdrawal:** Initiated by the student or counsellor for personal, academic, or financial reasons.
- **Rejection:** Communicated by the education provider due to eligibility issues, documentation gaps, course unavailability, or failed interviews.

Step-by-Step Process

1. **Login to CRM**
   Access the CRM system using your credentials.
2. **Navigate to the Application Section**
   a. From the **Dashboard**, go to the **Left Sidebar**.
   b. Select **"Applications"** to enter the application management module.
3. **Search for the Application**
   a. Use the **Application Search Page** to find the specific student application by entering the **CRM ID**.
   b. Click the matching result to open the **Applicant Profile Page**.
4. **Access the Process Tab**
   a. Inside the applicant's profile, click the **"Process"** tab to open the current application workflow.
   b. This section displays the application's stage and allows status updates.
5. **Mark as Withdrawn or Rejected**
   a. Scroll to the **bottom of the Process tab**.
   b. Locate the section titled **"Application Withdrawn / Rejected."**
   c. Use the checkbox to select either:
      i. Withdrawn – for student-requested withdrawal.
      ii. Rejected – for provider-declared rejections.
6. **Set Withdrawal or Rejection Date**
   a. Use the calendar picker to select the accurate **date of withdrawal/rejection**.
7. **Add Reason in Note Field**
   a. In the **Note box**, clearly state the reason for the decision.
   Examples:
      i. "Student requested withdrawal due to change of plans."
      ii. "Application rejected by university due to insufficient English score."

8. **Submit and Save Changes**
    a. After completing all fields, ensure you **save the update** to mark the application accordingly in CRM.

9) University Communication by Application Process

1) GTE Process – Minimal or No Direct University Communication

- **Main Focus:** Internal validation of applicant documents to meet GTE (Genuine Temporary Entrant) criteria.
- **Team Involved:** GTE Team
- **Purpose:** Ensure applicant meets eligibility and compliance before submitting to any institution.

University Communication:

- **No direct communication with universities** during this phase.
- All interactions are internal (between counsellors and the GTE team).
- The only exception: **In rare cases**, the GTE team may refer to **provider-specific GTE guidelines** or compliance checklists, but this is generally **not a live interaction** with the institution.

2) Application Process – Active University Communication Begins

- **Main Focus:** Preparing and submitting the student's application to the chosen institution.
- **Team Involved:** Application Team
- **Purpose:** Submit complete, compliant application forms and documents.

University Communication:

- **Yes – Active communication starts here.**

Types of University Communication:

- Application **submission** via university portals or email.
- Confirmation of **Application ID**.
- Responding to **queries or document requests** post-submission.
- Seeking clarification on application formats or **program-specific requirements**.

Tools Used:

- University email contacts
- Provider portals
- CRM notes (for logging follow-ups)

Example Communications:

- "Application submitted successfully. Awaiting Application ID."
- "Please find attached the additional financial document requested."

3) Communication Process – High Volume of University Communication

- **Main Focus:** Managing all ongoing communication after receiving the **Conditional Offer Letter (COL)**.
- **Team Involved:** Communication Team
- **Purpose:** To meet all the conditions set by the university and obtain the **Full Offer Letter**.

University Communication:

- **Yes – This is the most communication-intensive process.**

Types of University Communication:

- Sending requested documents to fulfill **COL conditions** (e.g., Financial docs, GTE approval).
- Requesting clarification on **offer letter terms**.
- Coordinating for **Full Offer issuance**.
- Handling **deferrals**, **agent change requests**, or **withdrawals**.

Example Communications:

- "The student has submitted the required financial documents. Please issue Full Offer Letter."
- "We request deferral to the next intake. Kindly reissue an updated offer."

Note: Every email and correspondence during this stage is **logged in CRM** for transparency and auditing.

4) CoE Process – Final University Communication

- **Main Focus:** Fulfill final requirements and obtain **Confirmation of Enrollment (CoE)**.
- **Team Involved:** CoE Team
- **Purpose:** Secure CoE so student can proceed with visa and enrollment.

University Communication:

- **Yes – Final set of communications with university.**

Types of University Communication:

- Submit **signed offer letter**, **payment confirmation**, and **OSHC** proof.
- Request and confirm issuance of **CoE**.
- Resolve any issues related to **CoE fee discrepancies** or **enrollment conditions**.

Example Communications:

- "Please find attached the signed offer and payment receipt. Kindly issue the CoE."
- "There's a fee discrepancy in the CoE – please clarify or resend."

Summary Table: University Communication per Process

Process	University Communication Required?	Nature of Communication
GTE	No	Internal document checks only
Application	Yes	Submission, document follow-up, Application ID

Communication	Yes	COL fulfillment, clarifications, full offer, deferral
CoE	Yes	Payment confirmation, CoE issuance, problem resolution

10) Notes/Comments Section Usage – Per Application Process

1) GTE Process

Purpose of Notes/Comments:

To document the **initial review**, missing documents, follow-ups with counsellors, and final approval status before moving to the Application stage.

When to Use It:

- After **document verification**
- When **raising a CRM task** for missing documents
- Once all required documents are complete and **GTE is approved**

What to Record:

- "Verified all GTE documents – academic, passport, SOP, financials."
- "Missing IELTS result and gap explanation – task raised to counsellor on [date]."
- "All documents complete. GTE approved on [date] – moving to Application stage."

Best Practice:

Use checklists
Note exact dates
Always reference CRM task ID if created

2) Application Process

Purpose of Notes/Comments:

To record all **pre-submission checks**, document preparation actions, application submission details, and interactions with the institution.

When to Use It:

- Before and after **application submission**
- If any **documents are missing or incorrect**
- When receiving **Application ID**

What to Record:

- "Submitted application to University of XYZ on [date] via portal/email."
- "Application ID: XYZ123456 received."
- "Pending: financial documents – requested from counsellor on [date]."
- "Re-submitted corrected SOP due to previous mismatch."

Best Practice:

Mention submission method (email, portal)
Record exact **Application ID**
Note resubmissions or corrections

3) Communication Process

Purpose of Notes/Comments:

To maintain a detailed log of all **university communications**, including document submissions for **COL conditions**, clarifications, and updates to counsellors/students.

When to Use It:

- After **Conditional Offer Letter (COL)** is received

- Upon sending or receiving required documents
- If clarification or deferral is requested

What to Record:

- "COL received on [date], forwarded to counsellor."
- "Student submitted updated bank statement on [date] – sent to university same day."
- "Requested deferral to next intake due to student request – awaiting revised offer."
- "University asked for notarized documents – forwarded request to counsellor."

Best Practice:

Track communication chain (who sent what and when)
Use bullet points for complex submissions
Cross-reference uploaded files in RDS if needed

4) CoE Process

Purpose of Notes/Comments:

To document the final actions leading to CoE issuance, including payment tracking, document submission, and CoE upload/verification.

When to Use It:

- After **Full Offer Letter** is received
- Upon receiving **fee payment confirmation**
- When CoE is received and uploaded

What to Record:

- "Payment confirmation uploaded on [date] – sent to provider for CoE."
- "OSHC confirmation received and verified."
- "CoE issued on [date] and uploaded to RDS under 'Final Docs'."
- "Notified student and counsellor of CoE issuance."

Best Practice:

Include all timestamps
Mention any discrepancies or delays
Mark final update clearly: “Process complete – CoE issued.”

11) Admission Reporting & KPIs Overview

The **Admission Team** uses structured reports under the **“Admission Report” section** in the CRM to monitor application progress, manage operational tasks, and ensure student conversions. Each sub-team (GTE, Application, Communication, CoE) uses tailored reports aligned with their roles and performance goals.

1) Application to Conversion Report

Report Description:

This report gives a **comprehensive view of all applications** that have moved into the Application Stage. It shows:

- **Current process stage** of the student (GTE, Application, Communication, CoE)
- **Admission follow-up status**
- **Counsellor notes and follow-ups**
- **New incoming applications**

Used By:

- All Admission Sub-Teams
- Admission Managers for overview and coordination

Associated Application Processes:

- GTE Verification
- Application Preparation & Submission
- Offer Handling (Communication)
- CoE Preparation

Associated KPIs:

KPI	Description
Application Intake Volume	Number of new applications received during the period
GTE Completion Rate	% of applications where GTE is completed within SLA
Average Stage Progression Time	Average time taken to move from one stage to the next
Counsellor Follow-up Rate	% of counsellor follow-ups logged and completed on time

Usage:

- **Daily monitoring** of incoming applications
- Identifying **stalled or delayed** applications
- **Inter-team coordination** based on status

2) Follow-Up Report

Report Description:

Tracks all CRM tasks and follow-ups that are **assigned, pending, or missed** by the Admission Team. This ensures tasks related to documentation, communication, and escalations are not overlooked.

Used By:

- All Admission Officers

- Supervisors, Team Leaders, and Managers

Associated Application Processes:

- GTE Document Requests
- Application Clarifications
- Offer Letter Conditions
- Payment or OSHC Verifications (CoE)

Associated KPIs:

KPI	Description
Follow-Up Completion Rate	% of CRM follow-up tasks completed within the due date
Missed Follow-Ups	Number of follow-ups missed beyond the due date
Average Follow-Up Closure Time	Average time to resolve and close follow-up tasks
CRM Task Accuracy	% of tasks with proper documentation and status updates

Usage:

- **Prioritize urgent actions**
- Avoid **process delays due to oversight**
- Used by Team Leaders for **daily task reviews**

3) Enrollment Report

Report Description:

Tracks **students who have received CoEs** and their **enrollment outcomes**. Used for final confirmation, visa preparation, and reporting to finance or compliance teams.

Used By:

- **CoE Team**
- **Admission Team Leaders**

- **Managers for final conversion reporting**

Associated Application Processes:

- CoE Issuance
- Final Student Payment
- OSHC Confirmation
- Pre-departure steps

Associated KPIs:

KPI	Description
CoE Issuance Time	Avg. time taken from Full Offer to CoE issuance
Enrollment Conversion Rate	% of CoEs that convert to actual student enrollments
CoE Accuracy Rate	% of CoEs issued without data errors or amendments
Drop-off Rate	% of students who received CoE but didn't enroll

Usage:

- **Track and confirm enrollments**
- Used for **visa support and commission calculation**
- Highlights **non-converted CoEs** for follow-up

12) Visa Tracking for Offshore

The **R22 - Offshore Applications Tracker** is a dedicated tool used by the **Counsellor** to monitor and manage **visa outcomes for offshore applicants**. Unlike onshore students, **offshore applicants require visa approval** before proceeding to final enrollment. This tracker ensures that their visa status is closely monitored and updated throughout the process.

Onshore vs Offshore Difference

Applicant Type	Visa Required	Visa Tracking Method

Onshore Students	Not Required (already in-country)	No visa tracking needed
Offshore Students	Required	Tracked via **R22 - Offshore Applications Tracker**

13) StudyLink Integration and Application Process

StudyLink is a trusted platform that simplifies the university course application process through expert support and a regularly updated global course database. It provides students with intuitive search tools to find suitable courses, allows direct communication with course providers, and offers expert guidance to help choose the right subject and destination.

In our application management process, StudyLink plays a vital role. Applications to certain institutions must either be submitted via the StudyLink platform or through institution-specific portals. To streamline this workflow, StudyLink has been fully integrated with our CRM system via API. This integration allows most of the application-related information to be filled in our CRM and then automatically transferred to StudyLink, improving efficiency and accuracy.

StudyLink–CRM Integration Process

To ensure a smooth connection between our CRM and StudyLink, the following five steps must be verified and completed:

1. **StudyLink Course Connected**
   a. Confirm that the course in our CRM is correctly linked to the corresponding course in StudyLink.
2. **StudyLink Provider Connected**
   a. Ensure the education provider listed in our CRM is connected to the matching provider in StudyLink.
3. **StudyLink Portal Registered**
   a. Assign the application to the appropriate StudyLink portal based on the student's status:
      i. **Onshore**: For students currently residing in the country.
      ii. **Offshore**: For students applying from abroad.
      iii. **Exception Handling**: Some universities may require onshore portal assignment even for offshore students—these must be handled case by case.

4. **StudyLink Applicant Created**
    a. Use the designated CRM function to create an applicant profile in StudyLink.
5. **StudyLink Application Created**
    a. Once the applicant is created, the application can be generated only if the following data matches exactly between CRM and StudyLink:
        i. Course Name
        ii. Course ID
        iii. Course Code
        iv. Provider ID

By following this structured approach, we ensure accurate and efficient submission of student applications via StudyLink.

Additional Notes on StudyLink Usage

- Not all applications are submitted through StudyLink. In some cases, the admissions team may use StudyLink, while in others, they are required to apply through the university's own dedicated portal. The choice depends on the specific provider's process.
- Once an application is successfully connected to StudyLink, a **StudyLink button** becomes available within the CRM interface. This feature allows counsellors to view a complete log of communication between StudyLink and the admissions team, including emails received by the admissions team.
- By clicking this StudyLink button, counsellors can:
    - Review email correspondence related to the application
    - Access and download submitted documents
    - Stay updated on the status of each application

This visibility enables counsellors to remain actively involved in the application process. Since the admissions team handles a high volume of applications and may require additional processing time, counsellors can proactively check for updates, gather requested documents, and can share those documents to admission team which is more efficient—ultimately speeding up the overall process.

StudyLink Integration & Usage Table

Step / Feature	Description

1. StudyLink Course Connected	Confirm the course in CRM is linked to the corresponding course in StudyLink.
2. StudyLink Provider Connected	Ensure the education provider in CRM matches the provider in StudyLink.
3. StudyLink Portal Registered	Assign the correct portal based on student status: • Onshore – For local students • Offshore – For international students • *Exceptions apply*
4. StudyLink Applicant Created	Use CRM to create an applicant profile in StudyLink.
5. StudyLink Application Created	After creating the applicant, generate the application only if: • Course Name matches • Course ID matches • Course Code matches • Provider ID matches
Not All Applications via StudyLink	Some providers require direct applications via their own portal. The admissions team decides the appropriate method.
StudyLink Button in CRM	Becomes visible after linking to the application. Counsellors can: • View StudyLink emails • See submitted documents • Download files
Counsellor Role & Visibility	Counsellors stay in the loop by regularly checking application status via the StudyLink button. Helps organize documents and speed up processing.

14) Difference Between Onshore and Offshore Applications

In the application process, it is important to distinguish between **onshore** and **offshore** applicants, as the documentation requirements and application handling can differ significantly.

- An **offshore applicant** is a student who is **currently outside the destination country** (e.g., applying from abroad).

- An **onshore applicant** is a student who is **already residing within the destination country**, often already holding a visa and potentially enrolled in a previous course.

Each application type requires a specific set of documents to comply with university and visa regulations. Understanding these differences helps counsellors collect the correct information early in the process and avoid delays.

Below is a detailed comparison of the documentation required for each applicant type:

Onshore vs Offshore Application – Document Comparison

Document / Requirement	Offshore Applicant	Onshore Applicant
Passport	Required	Required
Visa	Not applicable (applying from outside the country)	Required (must have a valid visa to study/stay)
Confirmation of Enrolment (COE)	Not applicable	Required (if previously enrolled or transitioning courses)
All Academic Documents	Required	Required
English Language Proficiency (ELP)	Required with verification snapshot (e.g., IELTS/TOEFL + snapshot proof)	Required
Marriage Certificate *(if married)*	Required	Required
Major	Required	Required
Spouse Documents *(if applying with spouse)*	Required – documents for spouse must be provided (passport, visa history, etc.)	Not typically required
Visa Refusal Letter & Explanation *(if applicable)*	Required if there was a previous visa refusal	Not applicable

CV *(for Master's applicants)*	Required – typically expected for postgraduate applications	Not always mandatory
Job/GAP Documents *(if study gap exists)*	Required – work experience letters, internships, or explanation letters	Not usually required
SN Declaration *(Student Number Declaration)*	Required	Required
Confirmation (Single or With Spouse)	Required – applicant must declare whether applying alone or with spouse	Not applicable

Summary

Understanding whether a student is **onshore or offshore** is crucial for proper document collection and application setup. Offshore applicants usually require **more documentation**, especially related to **visa history, marital status**, and **gaps in education or employment**. Onshore applicants, having an existing visa and possibly a prior enrolment, often need **fewer documents** but must provide **visa and COE** information.

This categorization helps both the **counsellors** and **admissions teams** streamline the process, improve accuracy, and ensure compliance with institutional and immigration requirements.

15) COE / LOA Tracking (If Applicable)

The **StudyNet COE Team** manages the complete process of requesting, tracking, and distributing **Confirmation of Enrolment (COE)** and **Letter of Acceptance (LOA)** documents for students. This process ensures accurate record-keeping, compliance with university requirements, and timely communication with stakeholders (students, agent partners, and sales teams).

COE/LOA Tracking Workflow

Step	Process Description

1. Offer Letter Issuance	The COE team sends the **official offer** to the student and requests the following documents: - Signed offer letter - Payment proof - OSHC (Overseas Student Health Cover) - Any additional documents as required by the institution Once the offer is sent, it must be **saved in RDS** and the CRM must be **updated accordingly**.
2. Document Verification & COE Request	After receiving the required documents, the team verifies them. If complete and correct, a **COE request is submitted to the university**. - The request is logged in the **CRM** - All documents are stored in the correct folder within **RDS** - Student, agent partner, and sales are notified that the COE request has been sent
3. COE Received & Processing	Once the COE is received (usually via the **info@ mailbox**): - Ensure all details are **accurate and match the request** - Update the **CRM** with COE details - Move the student's folder to the appropriate **final location in RDS** - Save the COE document in RDS - Share the final COE with the **student and sales**
4. Deferral / Withdrawal / Cancellation / Refund	If a student requests a change (e.g., **deferral, withdrawal, cancellation, or refund**): - Submit the request to the **university** - Update the **CRM** with new status - Store related documents in the appropriate **RDS folder**
5. Ongoing Tracking & Auditing	To maintain the accuracy and efficiency of the COE process, the team regularly performs: - Follow-ups with institutions and students - Management of "**In Process**" reports and **Task assignments** - **Weekly audits** of the info@ mailbox - Monitoring of **StudyLink BD** and **StudyLink Sydney portals** - Updating and maintaining the **Scholarship Audit File Tracker**

16) Color Coding Legend for an Application Status

This systematic tracking process ensures that all COE/LOA-related activities are properly handled, reducing errors, maintaining compliance, and improving communication across teams.

To help visually track the progress of COE/LOA applications, the following **color codes** are used in CRM dashboards, spreadsheets, or trackers:

Color	Status	Description
White	**Untouched**	The application has not been opened or reviewed yet. No action has been taken.
Purple	**Touched**	The application has been reviewed or acknowledged but has not yet been worked on.
Yellow	**Started**	The application process has been initiated. Document collection or follow-up is underway.
Green	**Approved**	The Application has been approved and received from the institution.
Red	**Rejected**	The application was declined or rejected by the institution/Us.

17) Escalation and Follow-Up Rules

To ensure timely resolution and smooth coordination, the following rules govern how **escalations** and **follow-ups** are handled across teams.

Escalation Rules

Aspect	Details
Dedicated Team	A specialized team of **3 members**, including the **Assistant Team Leader**, manages all escalations.
Response Time	All escalations must be acknowledged and acted upon within **2 hours**.
Role Allocation	- **1 member** handles **Onshore Escalations** - **1 member** handles **Offshore Escalations** - **1 member** handles **B2B Escalations**

Work Ownership	Assigned members take **full ownership** of their tasks and **do not reassign** them.
Scalability	If workload exceeds team capacity, **additional resources** are assigned for timely handling.

Follow-Up Rules

Aspect	Details
Report-Driven Process	Follow-ups are managed using the **Follow-Up Report** as the central source of truth.
Sorting & Categorization	The report is regularly reviewed, and follow-ups are categorized into: - **University Follow-Up Required** - **B2C Teams Follow-Up Required** - **B2B Teams Follow-Up Required**
Work Distribution	**Supervisors** review the categorized items and **assign tasks** to the appropriate teams.
Completion	All follow-ups are **actioned and closed systematically** once resolved.

Summary

- All **escalations** are treated with high priority and strict SLAs.
- **Follow-ups** are structured, report-based, and clearly distributed to avoid delays.
- Ownership, accountability, and scalability are built into both processes to ensure efficiency and clarity.