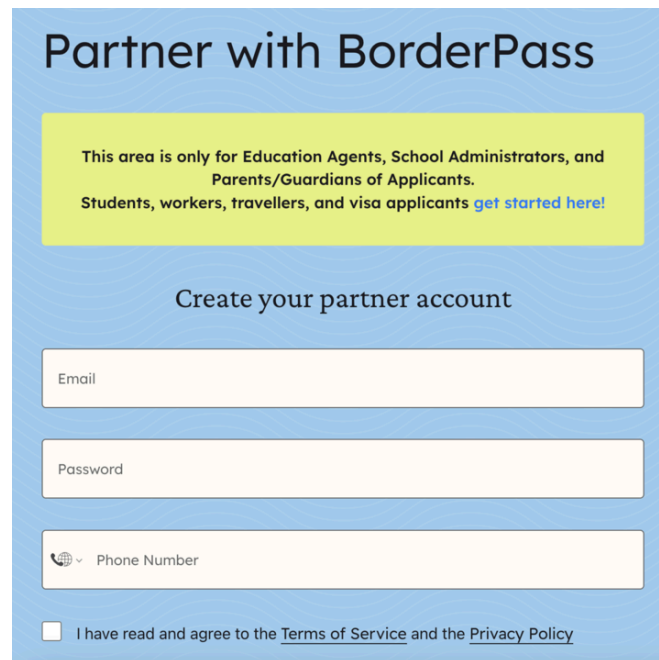


Getting Started with the Agent Portal

Follow the steps below (with screenshots for assistance) as you set up your Agent Portal within Borderpass. Our instructions below will cover the steps for how to sign up, sign in, invite students, access their accounts, and how to track all of your students' applications as an Agent within the Agent Portal.

1. Create Partner Account:

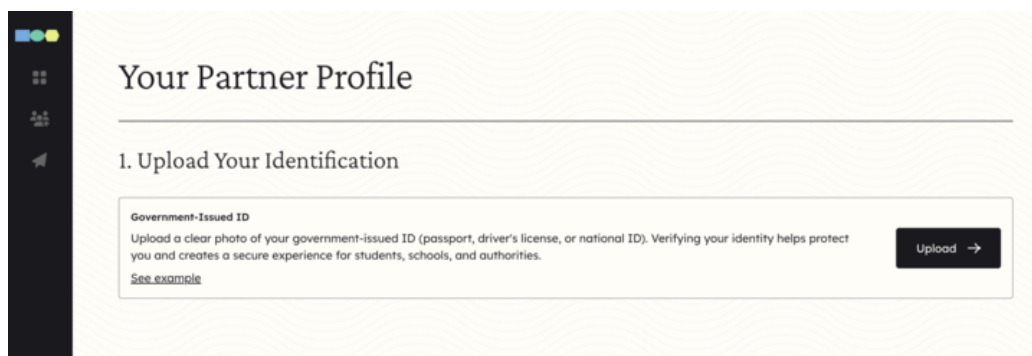
Visit <https://partners.borderpass.ai/signup> and enter your email, create a password, provide your phone number, and agree to terms.



The screenshot shows a sign-up page titled "Partner with BorderPass". Below the title is a yellow box with text: "This area is only for Education Agents, School Administrators, and Parents/Guardians of Applicants. Students, workers, travellers, and visa applicants [get started here!](#)". Below this is the heading "Create your partner account". There are three input fields: "Email", "Password", and "Phone Number" (with a phone icon and a dropdown arrow). At the bottom, there is a checkbox and the text "I have read and agree to the [Terms of Service](#) and the [Privacy Policy](#)".

2. Upload Identification:

Upload a clear image of your government-issued identification.



The screenshot shows a page titled "Your Partner Profile". Below the title is a section "1. Upload Your Identification". Inside this section is a box with the heading "Government-Issued ID" and the text: "Upload a clear photo of your government-issued ID (passport, driver's license, or national ID). Verifying your identity helps protect you and creates a secure experience for students, schools, and authorities." There is a link "See example" and an "Upload →" button.

3. Complete Your Profile:

After successfully uploading your ID, fill in your personal information and your company's details.

1. Upload Your Identification

Government-Issued ID

Upload a clear photo of your government-issued ID (passport, driver's license, or national ID). Verifying your identity helps protect you and creates a secure experience for students, schools, and authorities.

[See example](#)

Complete

Partner - Government Id - 1...

2. Complete Your Profile

Your Information

First Name

Last Name

Job Title

Email

Phone Number

Your Company's Information

Company Name (If Applicable)

Company Address (If Applicable)

[Enter Address Manually](#)

4. Acknowledge Terms:

Read and agree to BorderPass's acknowledgment and terms.

Acknowledgment and Terms

By creating a BorderPass account and accessing client profiles through the platform, I confirm the following:

- I am authorized to access immigration-related information and documents on behalf of the applicants I represent, as an independent agent and/or as a representative of .
- I understand that I am personally responsible for maintaining the confidentiality of all information I access through BorderPass. This includes, but is not limited to, any details relating to individual applicants, their personal information, and any immigration applications or legal documents.
- I agree not to use any data accessed through BorderPass for any purpose other than assisting my clients with their immigration and study permit processes.
- I will not misuse the platform or any data obtained through it in any way.
- I will act in a professional and responsible manner, in full compliance with all applicable laws and regulations.
- I agree to report any concerns, technical issues, or suspected misuse of the platform to BorderPass customer support without delay.
- I acknowledge that any failure to uphold these responsibilities may result in the suspension or termination of my access, and I may be held personally liable for any breach of confidentiality or misuse of the platform.

By proceeding, I accept and agree to these terms.

[I Agree to the Terms](#)

5. Add Students to Your Account:

Enter students' email addresses and passport numbers to add them to your account. Click "+ Add another student" to create multiple entries for student invites.

Add Clients to Your Account

Enter Student Passport and Student Numbers

You can add students to your Agent Account anytime. Enter student information now, or press Continue to do this later.

Student Email

Student's Passport Number

Enter Student Email

Enter Passport Number



[+ Add another Student](#)

Continue 

6. Verify Students:

Confirm student details and email them for verification.

Add Clients to Your Account

Email Students for Verification

Please verify all student information before continuing.

If the student's name is shown, the student has a BorderPass account.

Student Name

Student's Email

Martin, Sarah

amarkov@test.ru 

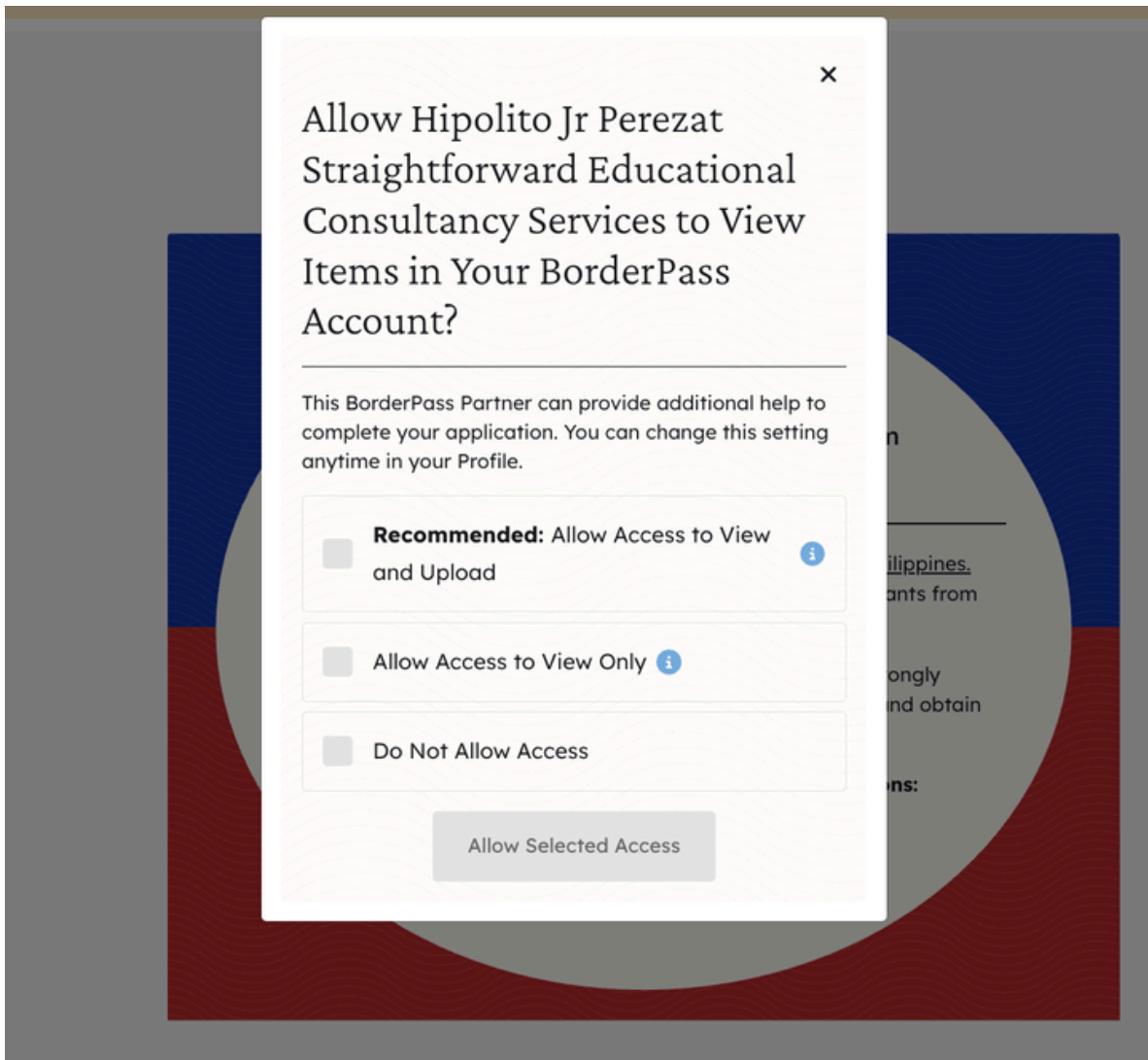


Back

Email Students for Verification →

7. **Confirm Student Access:**

Once the invite is sent, the student will receive an email with a notification that redirects them to the Borderpass account to provide access to the Agent. The student will need to accept the invitation before the Agent can see the student in their portal.



8. Access Partner Dashboard:

View the Partner Dashboard to see your added students and their application statuses.

Partner Dashboard

Welcome back, Partner!

Search and Filter

Filter by Visa Type

Filter by School

Filter by Application Status

Student List

Student Name ▲	Email	Application Type	Application Date	Status
Martin, Sarah	amarkov@test.ru	Temporary Resident Visa PGWP	2024/11/12	In Lawyer Review >
Martin, Sarah	amarkov@test.ru	Onboarding Assessment	2024/11/12	Cancelled >
Martin, Sarah	amarkov@test.ru	Study Permit	2024/11/12	In Lawyer Review >
Martin, Sarah	amarkov@test.ru	Post-Graduation Work Permit	2024/11/12	In Lawyer Review >
Martin, Sarah	amarkov@test.ru	Study Permit Extension with Family	2024/11/12	Payment Required >
fdf, dsf	sdfg@borderpass.ai	Judicial Review	2025/05/22	In Progress >

9. Review Student Applications:

Hover over any row in the Student List and click the highlighted row to open up that particular student's application.

Student List

Student Name ▲	Email	Application Type	Application Date	Status
Martin, Sarah	amarkov@test.ru	Temporary Resident Visa PGWP	2024/11/12	In Lawyer Review >
Martin, Sarah	amarkov@test.ru	Onboarding Assessment	2024/11/12	Cancelled >
Martin, Sarah	amarkov@test.ru	Study Permit	2024/11/12	In Lawyer Review >
Martin, Sarah	amarkov@test.ru	Post-Graduation Work Permit	2024/11/12	In Lawyer Review >
Martin, Sarah	amarkov@test.ru	Study Permit Extension with Family	2024/11/12	Payment Required >
fdf, dsf	sdfg@borderpass.ai	Judicial Review	2025/05/22	In Progress >

10. Pending Invitations:

If a student has not accepted the invite yet, the status will remain in "Invite Pending". You will not be able to hover over or click into that student's application until they accept the invite.

Doe, John	test-michaeltest97@borderpass.ai	Onboarding Assessment	2025/05/24	Invite Pending	>
Doe, John	test-michaeltest97@borderpass.ai	Study Permit	2025/05/24	Invite Pending	>

11. Client Document Management:

View and manage your client's document status, upload documents, or request missing ones.

dsf fdsf

Client Information

Email: sdfg@borderpass.ai
Passport Number: P123456789
Student Number: 34554345355234

DLI: Fairleigh Dickinson University
Application Number: S307783075
Status: In Progress
Paid Required Fees: Yes

[Impersonate Client](#)

[Remove Client From Account](#)

Document Status

Documents

Relationship Status (Spouse/partner)	Recommended	Not uploaded
Marriage Certificate		Upload Request
Procedural Fairness Letter	Recommended	Not uploaded
Original Refused Application	Complete	View All Download
Refusal Letter	Complete	View All Download
Current Valid Permit	Recommended	Not uploaded
99	Recommended	Not uploaded

12. Client Impersonation:

If needed, click "Impersonate Client" to view the student's portal exactly as they see it.

Client Information

Email: sdfg@borderpass.ai
Passport Number: P123456789
Student Number: 34554345355234

DLI: Fairleigh Dickinson University
Application Number: S307783075
Status: In Progress
Paid Required Fees: Yes



[Impersonate Client](#)

[Remove Client From Account](#)

Document Status

13. Confirm Impersonation:

Confirm you wish to impersonate the client, understanding your actions are logged.

 **Confirm Impersonation** 

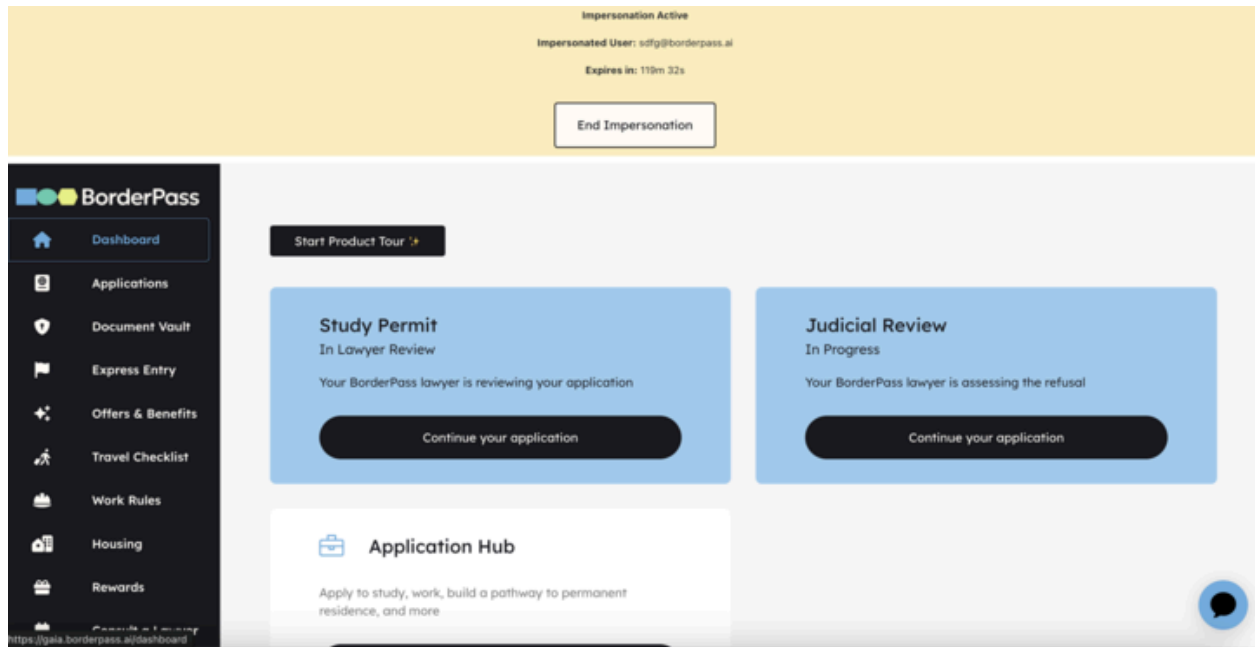
Are you sure you want to impersonate this user?

You will be able to view and interact with the application as this user.
Your actions as the impersonator will be logged during your session.

[No, Cancel](#) [Yes, Impersonate →](#)

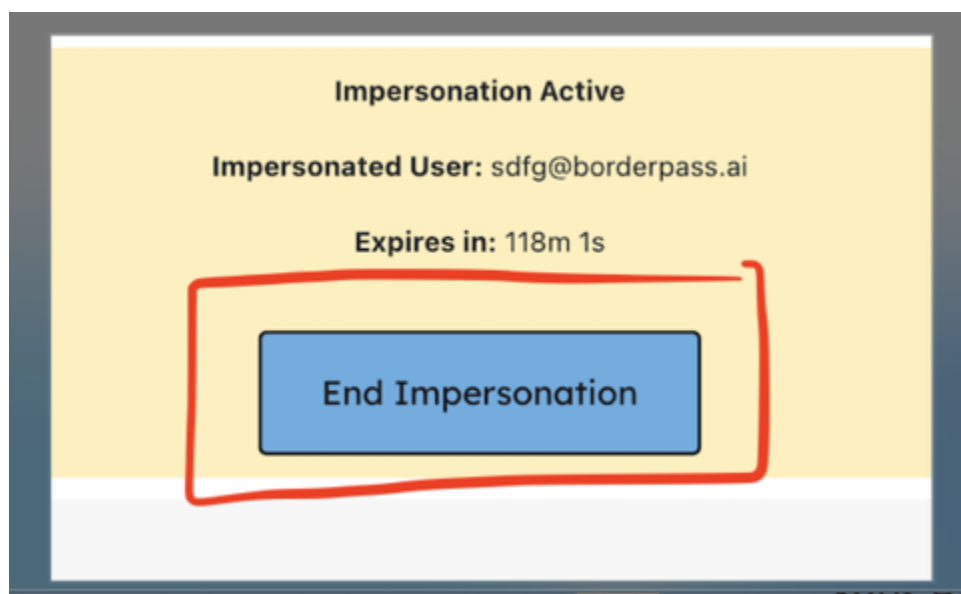
14. Client View (Impersonation Mode):

Navigate through your client's dashboard to understand their application status and available actions.



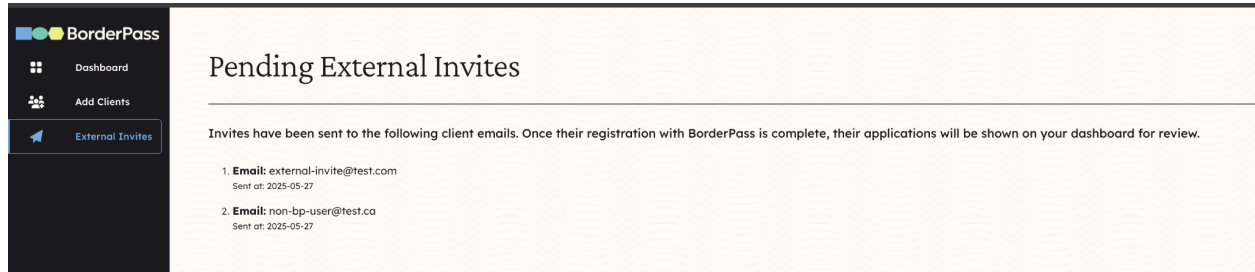
15. End Impersonation:

Click "End Impersonation" when you have completed reviewing the client's view. You will not be able to access your partner dashboard until you end the impersonation. You can only impersonate one student at a time.



16. External Invite Status:

Review the "Pending External Invites" to track invites sent to clients awaiting account registration completion. Click "Add Clients" to continue to invite students to your Agent Portal.



BorderPass

Dashboard
Add Clients
External Invites

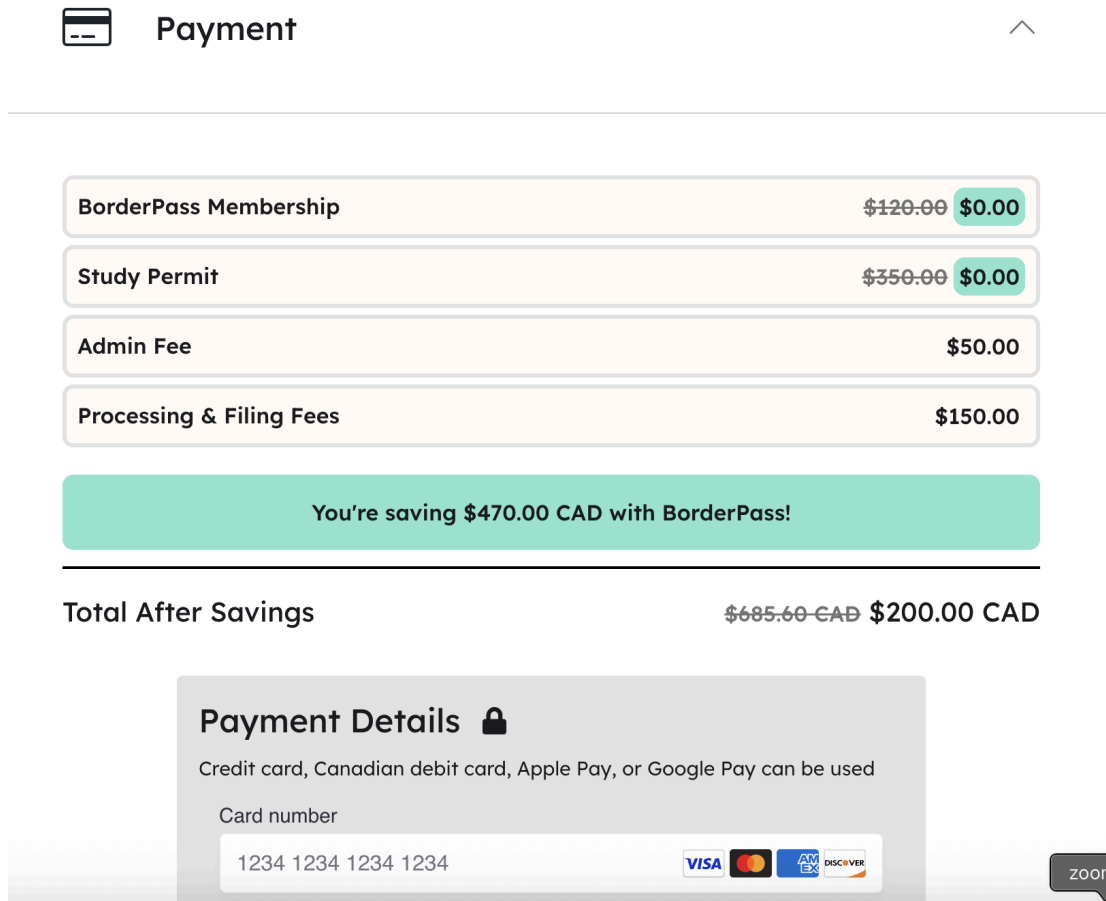
Pending External Invites



Invites have been sent to the following client emails. Once their registration with BorderPass is complete, their applications will be shown on your dashboard for review.

- Email:** external-invite@test.com
Sent on: 2025-05-27
- Email:** non-bp-user@test.ca
Sent on: 2025-05-27

Student Pricing in the Agent Portal

If you as the Agent are inviting students that will be attending one of the Designated Learning Institutions (DLIs) that is partnered with Borderpass, the DLI partner pricing will appear for the student (i.e. a student at Thompson Rivers University) at checkout. Click [here](#) to view the list of our existing DLI Partners.



 **Payment** 

BorderPass Membership	\$120.00 \$0.00
Study Permit	\$350.00 \$0.00
Admin Fee	\$50.00
Processing & Filing Fees	\$150.00

You're saving \$470.00 CAD with BorderPass!





Total After Savings ~~\$685.60 CAD~~ **\$200.00 CAD**


Payment Details

Credit card, Canadian debit card, Apple Pay, or Google Pay can be used


Card number

1234 1234 1234 1234


   



If you as the Agent are inviting students that will **not** be attending one of the Designated Learning Institutions (DLIs) that is partnered with Borderpass, the standard Agent pricing discount will be displayed at checkout:



Payment



BorderPass Membership

~~\$120.00~~ \$0.00

Study Permit

~~\$350.00~~ \$175.00

Admin Fee

\$50.00


Processing & Filing Fees

\$150.00

You're saving \$295.00 CAD with BorderPass!

Total After Savings

~~\$685.60 CAD~~ \$375.00 CAD

Payment Details 

Credit card, Canadian debit card, Apple Pay, or Google Pay can be used

Card number

1234 1234 1234 1234

