



AGENT PORTAL GUIDE

Last Updated

October 2, 2024

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To search a topic in the web-based portal guide use **Command + F (Apple)** or **CTRL + F (PC)**.

Introduction

Welcome to the TRUE North Agent Portal. In collaboration with school boards, TRUE North provides agents with a secure web-based system that provides:

- A unified portal with access to all school boards you are working with in a single sign-in.
- Online application management.
- Ability to work collaboratively with other agents.
- Access to student details.
- Access to student fees with integrated payment options.
- Secure messages.
- Two-way secure document sharing.
- Student Insurance Information.
- Notifications of new and actionable information.

Accessing the Agent Portal

To access the TRUE North Agent Portal, your email address must be associated as an active agency with one or more school boards. The Agent Portal can be accessed in two different ways:

- International Student Program Websites
- TRUE North Global Sign In

Accessing the Agent Portal from the School Board Sign In

It is common for school boards to provide a direct link to the TRUE North Agent Portal from their international student program website. Locate this link to the TRUE North Portal and then click the Agent Start Here link (exact wording may vary).



Agents Start Here

For active agents working with Sandbox School District.

Accessing the Agent Portal from the TRUE North Global Sign In

TRUE North now provides a convenient global sign in for all school boards. Simply navigate to mytruenorth.ca and click the **Agent Sign In** button at the top.



First Time Sign In

If this is your first time accessing the agent portal, the following steps are required:

- 1. Enter your email address and press the **Sign In** button.

Agent Portal Sign In

Email: *
 Sign In

- [Reset Password](#)
- [Agent Portal Guide](#)
- [Sign In Help](#)

- 2. Click the **Verify Email** button.

Welcome to the Agent Portal

This looks like your first time signing in to TRUE North using **demo@mytruenorth.ca**. To get you up and running we will need to first verify your email address and then help you create a password. Lets get started!

Verify Email

- 3. Copy and paste the pass code that is just been emailed to you and press the **Verify** button.

Agent Portal Email Verification

A one-time passcode has been emailed to **demo@mytruenorth.ca**. Please enter the passcode below and press the **Verify** button.

Do not close this window until you have entered your passcode.

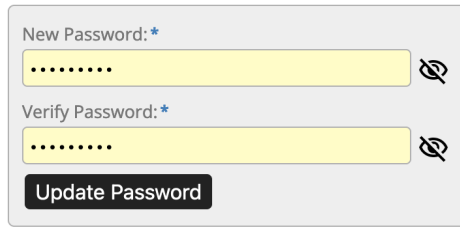
Passcode: *
 Verify
[HELP! I DID NOT RECEIVE AN EMAIL](#)

4. Enter your new password and press the **Update Password** button.

Agent Portal New Password

Password Requirements for demo@mytruenorth.ca

- minimum of **8 characters** in length
- contain at least one **lower case letter**
- contain at least one **upper case letter**
- contain at least one **number**
- contain at least one of the following symbols: **!@\$%&**



The screenshot shows a form with two password input fields. The first field is labeled 'New Password: *' and the second is 'Verify Password: *'. Both fields contain masked characters (dots) and have an eye icon to toggle visibility. Below the fields is a black button labeled 'Update Password'.

5. Click the Return to Sign in link and sign in with your new password.

Agent Portal Password Updated

Your password has been successfully updated. Please use the sign in link below to access the agent portal.

← [Return to Sign In](#)

Sign In Help

If you are experiencing difficulty signing into the Agent Portal, use the Password Reset and/or Sign In Help links.

Agent Portal Sign In



The screenshot shows a sign in form with an 'Email: *' label, an input field, and a black button labeled 'Sign In'.

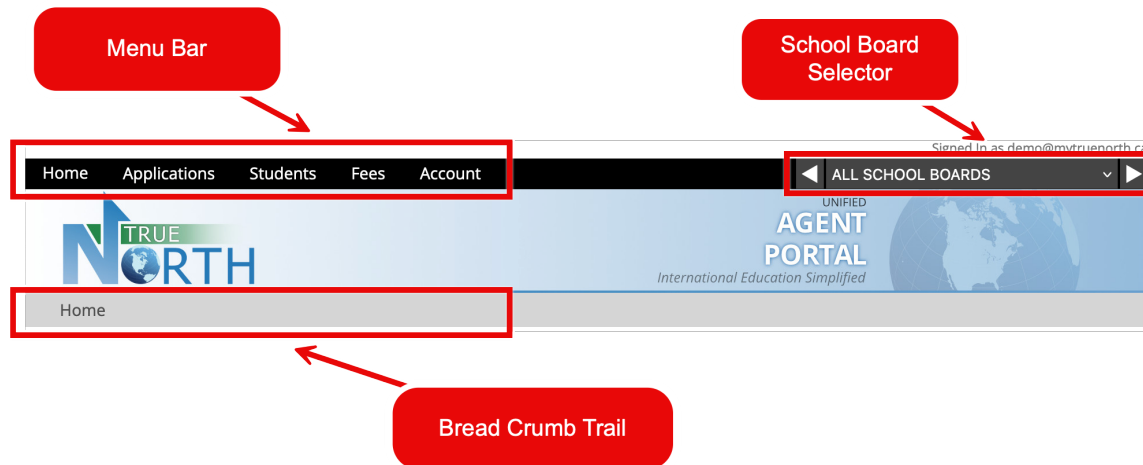
 [Reset Password](#)

 [Agent Portal Guide](#)

 [Sign In Help](#)

Navigation

Navigation within the Agent Portal is achieved using the following user interface elements:



Menu Bar

The menu bar provides access to various topics of information for the agent.



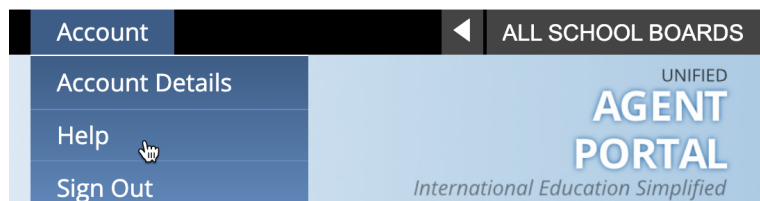
Home: View date sensitive information and convenient quick links.

Application: Create, view and edit application. Applications instructions can also be viewed for preparing an application.

Students: View students details and insurance information, shared documents and secure portal messages.

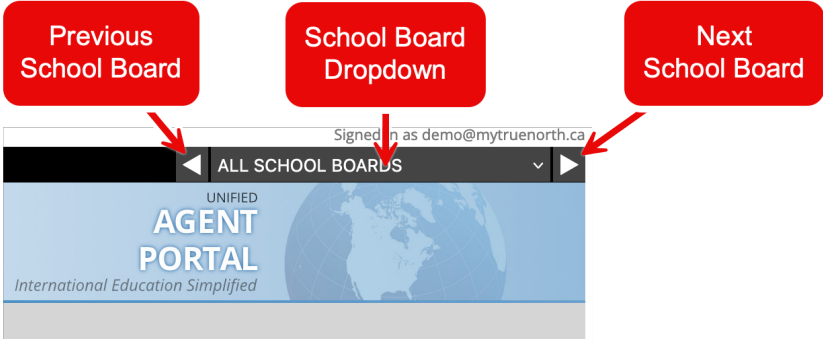
Fees: View and print fees and securely share fees with parents or students. Many international student programs are now integrated with payment gateways and offer direct payment links for **Flywire** or **Convera**. See *Integrated Payments* section of this guide for more information.

Account: Ability for the agent to view account details, change their password, manage notifications, access help documents and sign out of the agent portal.

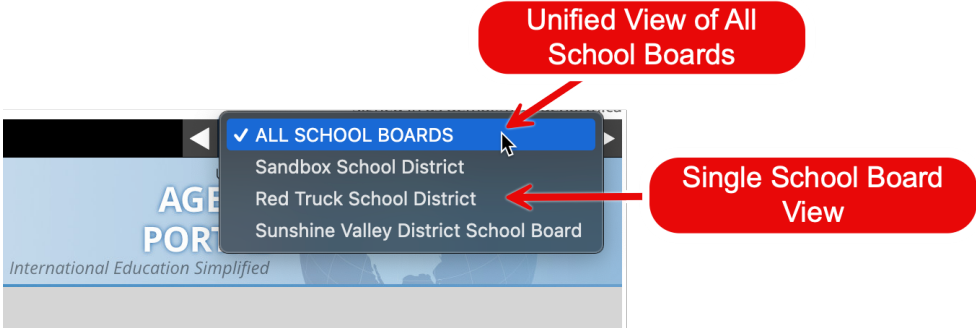


School Board Selector

The **School Board Selector** allows agents to effortlessly switch between school boards without logging out and back in again. In addition, agents may select the "All School Boards" option for a unified view of all school board information together. The school board selector has three elements as shown below:



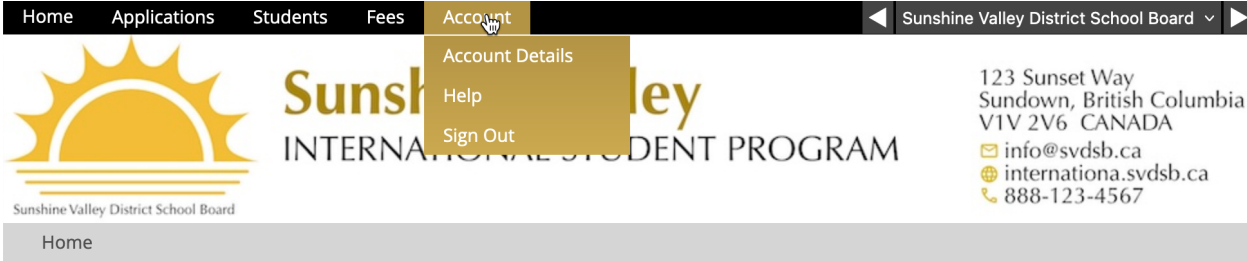
Clicking the School Board Dropdown will provide easy navigation between any school board and the "All School Boards" option.



When using the "All School Boards" option, the Agent Portal will use the global banner and the following colour theme:



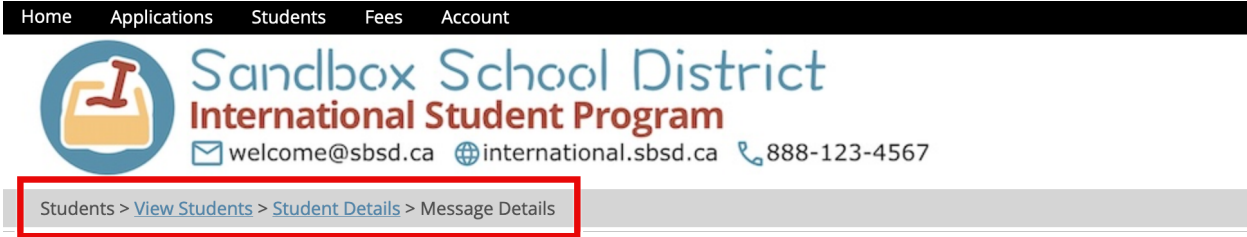
When viewing a specific school board, the Agent Portal may utilize a custom banner and colour theme as shown in the following example:



IMPORTANT!
The School Board Selector will immediately adjust both the displayed data and the available task options on any page. Always confirm that the selector is set to match your desired scope and task. Select ALL SCHOOL BOARDS to view all available data and perform tasks across all school boards. To focus on a specific school board, change the selector to narrow the displayed data and task options for only that board.

Bread Crumb Trail

The **Bread Crumb Trail** provides a visualization of the path taken to the current screen. Each previous step is a hyperlink that can be clicked to return to a previous page.



↑ ↑
Links to previous pages

Home Page

The Home Page contains Date Sensitive Information and Quick Links which will change depending on the School Board Selector.

Home Page in All School Board View

Welcome to the Unified Agent Portal

Date Sensitive Information

Applications: [10 expired](#) (will be auto-deleted soon)
Fees: [1 new](#) (last 7 days), [18 overdue](#)
Secure Messages: [22 new](#)
Shared Documents: [2 new](#)

Quick Links

[Create New Application](#)
[View Applications](#)
[View Students](#)
[View Shared Documents](#)
[View Fees](#)

Home Page in a Specific District View

Welcome to the Agent Portal for Sandbox School District

Date Sensitive Information

Applications: [5 expired](#) (will be auto-deleted soon)
Fees: [1 new](#) (last 7 days), [2 overdue](#)
Secure Messages: [2 new](#)

Date Sensitive Information (All Agent Contacts)

Applications: [5 expired](#) (will be auto-deleted soon)
Fees: [1 new](#) (last 7 days), [2 overdue](#)
Secure Messages: [2 new](#), [2 last 30 days](#)
Shared Documents: [2 new](#), [2 last 30 days](#)

Quick Links

[Application Instructions](#) (before you begin)
[Create New Application](#)
[View Applications](#)
[View Students](#)
[View Shared Documents](#)
[View Fees](#)

Only visible with
Global Access

About Global Access

Global Access provides the currently signed in agent with access to information (students, applications, fees, etc.) from all other agent contacts within the same agency. This is the default behaviour in TRUE North. However, some large agencies find it preferable to isolate information between each agent contacts (ie: disable global access). Please contact your school boards for assistance with global access changes.

Applications

Creating Applications





Applications can be created in two ways:

- Navigate to **Applications > Create New Application**
- Navigate to **Applications > View Applications** and then click  Create New Application




Each School Board may display the following elements (shown below):

- A Link to international student program website.
- An Email address to contact international student program.
- A welcome message with important info about the current capacity and availability.
- Application Tips with **important information**.
- Applications that have recently been closed, currently open and opening soon.

Red Truck School District

 <http://visit.rtsb.bc.ca> |  welcome@rtsb.bc.ca |  [Welcome Message](#) |  [Application Tips](#)

International Students

-  September 1, 2024
CLOSED JULY 1, 2024
-  February 1, 2025
CLOSES DECEMBER 31, 2024
-  September 1, 2025
OPENING APRIL 1, 2025

[Apply for International Students](#)

Click the **Apply** Button for the desired application.

Enter the required information and press the **Create Application** button:

IMPORTANT! Do not enter names in UPPERCASE. Please use correct capitalization:

😊 Samantha Tabitha Johnston
☹️ SAMANTHA TABITHA JOHNSTON

Required Information

Application: * International Students DESCRIPTION OF APPLICATION TYPE

Legal Last Name: * Biologist AS IT APPEARS ON STUDENT PASSPORT

Legal First Name: * Maureen AS IT APPEARS ON STUDENT PASSPORT

Birthdate: * February 6, 2008 CLICK ICON OR TYPE DIRECTLY IN THE FORMAT "APRIL 1, 2001"

Back Create Application ←

Editing and Submitting Applications

Note that applications expire and are auto-deleted soon after the expiry date! Observe the number of days within which the application must be completed. Different buttons appear at the bottom of each section.

- **Back:** Takes the agent to *Applications > View Applications*. Once *Create Application* has been clicked in the application process, all in-progress and declined student applications appear here.
- **Save & Go Previous:** Saves the information entered in the current section and returns to a previous section.
- **Update:** Saves updated information in the current section.
- **Save & Go Next:** Saves the information in the current section and moves forward to the next section.

Back Save & Go Previous Update Save & Go Next

Sections of the application will be highlighted as they are completed. The number of sections and information requested can vary by international student program.

Complete the information in each section and use **Save & Go Next** button to move to the next section. Once this is done, completed sections will be displayed.

This application must be completed within 7 days.

All fields marked with a * are required.

| Section | Section | Section | Section | Section | Section | Section | Section | Section | Section | Section | Section | Section |
|----------|----------|----------|----------|---------|---------|---------|---------|---------|---------|---------|---------|---------|
| <u>1</u> | <u>2</u> | <u>3</u> | <u>4</u> | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 |

Section 4 of 13 - Parent Two Information

You may submit parent information for two parents. **Parent One** will be considered the "**primary**" parent for correspondence.

Parent 2 Info Available: * - Select -

Back Save & Go Previous Update **Save & Go Next**

In the final section, a **Save & Submit Completed Application** will appear. When this is clicked, no further changes cannot be made to the application. If any additions or changes need to be made after an application is submitted, contact the school board directly.

Note:

For international student programs using integrated payment systems (Flywire or Convera), a secure payment link may appear for online payment of the application fee. Follow the payment instructions to pay the application fee.

Sharing An Application with Parents

This function enables an agent to share the application form so parents can complete information. It is still the responsibility of the agent to submit the completed application to the school board.

1. Navigate to **Application > View Applications**.
2. Click the **How to Share an Application** hyperlink to display instructions.
3. Follow the instructions in the guide to share the application.

[+ Create New Application](#)

[? How to Share An Application](#)

IMPORTANT!

Agents should NEVER share their passwords with parents or students.

Students > View Students

View all students enrolled within the international student program that are associated with the agency.

1. Navigate to **Students > View Students**.
2. Ensure the desired scope is set in the School Board Selector to ALL SCHOOL BOARDS.
3. Filter as desired and click the Search Button.

| Details | Student Name | Birthdate | Latest Enrolment | Agency Contact | Shared Files | Country |
|---------|---|---------------------------|-----------------------------|------------------|--------------|---------------|
| | Aardvark, Aydin SANDBOX SCHOOL DISTRICT | February 25, 1958 7455 | Jun 1, 2024 JUN 30, 2025 | Norte, Verdadero | 0 | Peru |
| | Aberson, Oakleigh SANDBOX SCHOOL DISTRICT | February 28, 2008 7458 | Jun 1, 2024 JUN 30, 2025 | Norte, Verdadero | 0 | United States |
| | Adams, Hailey (Higgins) SUNSHINE VALLEY DISTRICT SCHOOL BOARD | February 6, 2008 7436 | Sep 1, 2024 JUN 20, 2025 | Norte, Verdadero | 4 | Brazil |

Click the details icon of the student to be viewed. Basic demographics will be displayed, along with a:

- **Docs** tab: Displays documents shared between the agent and the international student program. Click the document link to view the document.
- **Messages** tab: Displays secure messages sent to the agent from the international student program. Click the Message Details icon to view the message.
- **Credentials** tab: convenient access to insurance details and printable insurance wallet cards.

Student Details

Legal Name:

Common Name:

Birthdate: AGE 16

Gender:

Latest Enrolment:

Country:

Agent Contact:

Docs
Messages
Credentials

| Edit | Filename | Size | Date Shared | Remove |
|------|---|---------|--------------------------|--------|
| i | passport.jpg | 27.5KB | May 7, 2024 6:12AM | ⊗ |
| i | Parent Reference Letter.pdf <small>SHARED FROM SUNSHINE VALLEY DISTRICT SCHOOL BOARD</small> | 41.1KB | May 4, 2024 1:24PM | ⊗ |
| i | imgres-1.jpeg <small>SHARED FROM SUNSHINE VALLEY DISTRICT SCHOOL BOARD</small> | 7KB | May 4, 2024 1:23PM | ⊗ |
| i | Buddy.jpg <small>SHARED FROM SUNSHINE VALLEY DISTRICT SCHOOL BOARD</small> | 272.3KB | April 30, 2024 6:26AM | ⊗ |

+ Add Shared Document

Back

Students > View Shared Documents

Documents can be securely shared bi-directionally between school boards and agents.

School Board Sharing Documents with Agents

When a document is shared from a school board, notifications will be displayed on the home page as follows:

Welcome to the Agent Portal for Sunshine Valley District School Board

Date Sensitive Information

- Applications: 2 expired (will be auto-deleted soon)
- Fees: 8 overdue
- Secure Messages: 14 new
- Shared Documents: 2 new ←

Follow the link to shared documents or navigate to Students > View Shared Documents

Apply any additional filtering as needed and click the **Search** button.

Students > View Shared Documents

Document Shared: Document Read: All Agent Contacts:

Document Name: Student Last Name: Student First Name:

Displaying 2 Documents

| Student Details | Student Legal Student Common | File Name | Size | Date Shared | Agent Contact |
|-----------------|--|--|--------|------------------------|------------------|
| | Adams, Hailey Adams, Higgins | Parent Reference Letter.pdf SHARED FROM TRUE NORTH | 41.1KB | May 4, 2024 1:24 PM | Norte, Verdadero |
| | Adams, Hailey Adams, Higgins | imgres-1.jpeg SHARED FROM TRUE NORTH | 7KB | May 4, 2024 1:23 PM | Norte, Verdadero |

Displaying 2 Documents

Agents Sharing Documents with School Boards

Navigate to the desired student and click the **Add Shared Document** button.

Students > [View Students](#) > Student Details

Student Details

Legal Name:
Common Name:

Birthdate: AGE 16
Gender:

Latest Enrolment:
Country:

Agent Contact:

| Edit | Filename | Size | Date Shared | Remove |
|------|--|---------|---------------------------|--------|
| | passport.jpg | 27.5KB | May 7, 2024 6:12 AM | |
| | Buddy.jpg SHARED FROM SUNSHINE VALLEY DISTRICT SCHOOL BOARD | 272.3KB | April 30, 2024 6:26 AM | |

Upload the desired document and press the **Upload Shared Document** button.

Students > [View Students](#) > [Student Details](#) > Shared Document Details

Shared Document Details

Uploaded documents may be renamed and/or removed for one hour. Sunshine Valley District School Board will be automatically notified of this shared document.

File: No file selected. **1**

2

The school board will be notified automatically that you have shared a document.

Students > View Secure Messages

In addition to email messages, school boards may send Secure Messages directly to the agent portal. Secure Messages have the following benefits.

- They are more secure than email.
- They are permanently visible in agent portal.
- Secure messages are more consistent when printing the messages, letters and attachments.

When secure messages are sent from a school board, notifications will be displayed on the home page as follows:

Welcome to the Agent Portal for Sunshine Valley District School Board

Date Sensitive Information

Applications: [2 expired](#) (will be auto-deleted soon)
Fees: [8 overdue](#)
Secure Messages: [14 new](#) ←
Shared Documents: [2 new](#)

Follow the link to secure messages or navigate to Students > View Secure Messages

Apply any additional filtering as needed and press the **Search** button.




Students > View Secure Messages

Message Sent: Last 90 Days | Message Read: No

Search: Carter

Buttons: Search, Reset

Displaying 1 Message

| Student Details | Student Legal Student Common | Message Details | Message Subject | Recipient | Date Sent |
|---|---|---|----------------------|--|------------------------|
|  Figuroa, Carter Figuroa, Carter |  |  | Letter of Acceptance | Verdadero Norte DEMO@MYTRUENORTH.CA | May 4, 2024 1:30 PM |


Annotations: Mark message as read or unread (points to read/unread icon), View Message (points to envelope icon)

Click the **envelope icon** to view the message. A convenient "printable version" is available along with printing tips to ensure you remove browser headers/footers before printing.


Students > View Secure Messages > Message Details

Message Details

From: Blair Hope <>>
To: Verdadero Norte <DEMO@MYTRUENORTH.CA>
Date: May 4, 2024 1:30 PM
Subject: Letter of Acceptance



Red Truck School District
INTERNATIONAL STUDENT PROGRAM
welcome@rtsb.bc.ca | visit.rtsb.bc.ca | 888-123-4567



Adventure Awaits

OFFICIAL LETTER OF ACCEPTANCE

May 4, 2024

No parents flagged

RE: Figuroa, Carter DOB: February 5, 2008, Bolivia - Letter of Acceptance

Dear No parents flagged:

Buttons: View Printable Version, Printing Tips

Fees > View Fees

Fees can be viewed in the agent portal. When a school board adds new fees, notifications will be displayed on the home page as follows:

🕒 Date Sensitive Information

Applications: [5 expired](#) (will be auto-deleted soon)

Fees: [1 new](#) (last 7 days), [2 overdue](#) ←

Secure Messages: [2 new](#)

Follow the link to fees or navigate to Fees > View Fees. Apply any additional filtering as needed and press the **Search** button.

Fees > View Fees

Fees Paid: All Fees | Fees Created: Last 365 Days | Reference #: | Last Name: | First Name: [Search] | [Reset]

Agent Contacts: All Agent Contacts

[How to Share Fees](#)

Displaying 7 Fees

| Reference # School Year | Student Name School Board | Print | Share | Pay | Due Date | Payment Status | Fees | Paid | Due | Agent Last Agent First |
|----------------------------|--|------------|------------|--------------------------------------|----------------|---|-----------|-----------|-----------|---------------------------|
| 4250 2024-2025 | Arnold, Maximiliano SANDBOX SCHOOL DISTRICT | - Select - | NOT SHARED | PAID | Apr 1, 2024 | | 15,401.00 | 15,401.00 | 0.00 | Norte Verdadero |
| 4252 2024-2025 | Barry, Phillip SANDBOX SCHOOL DISTRICT | - Select - | NOT SHARED | PAID | Jun 1, 2024 | Guaranteed (\$25,350.00 CAD) JUL 11, 2024, 8:45 AM TNP656855368 | 25,350.00 | 25,350.00 | 0.00 | Norte Verdadero |
| 4253 2024-2025 | Beard, Adalynn SANDBOX SCHOOL DISTRICT | - Select - | NOT SHARED | PAID | Jun 1, 2024 | Guaranteed (\$25,350.00 CAD) MAY 2, 2024, 7:13 AM TNP976149343 | 25,350.00 | 25,350.00 | 0.00 | Norte Verdadero |
| 4254 2024-2025 | Brooks, Elle SANDBOX SCHOOL DISTRICT | - Select - | NOT SHARED | PAY NOW WITH FLYWIRE SANDBOX MODE | JUN 1, 2024 ⚠️ | | 25,350.00 | 0.00 | 25,350.00 | Norte Verdadero |

Printing Fees and Receipts

Printable invoices, statements of account and receipts are all available under the print dropdown as follows:

| Reference # School Year | Student Name School Board | Print | Share |
|----------------------------|--|---|------------|
| 4250 2024-2025 | Arnold, Maximiliano SANDBOX SCHOOL DISTRICT | <ul style="list-style-type: none">✓ - Select -AGENT<ul style="list-style-type: none">InvoiceStatement of AccountReceipt #3798FAMILY<ul style="list-style-type: none">InvoiceStatement of AccountReceipt #3798 | NOT SHARED |

Sharing Fees

This function enables an agent to share fees with parents and students for viewing and/or paying. Note that any commission information will NOT be viewable by parents.

1. Navigate to **Fees > View Fees**.
2. Click the **How to Share Fees** hyperlink to display instructions.
3. Follow the instructions in the guide to share fees.

 [How to Share Fees](#) 




REMINDER!
Agents should NEVER share their passwords with parents or students.

Integrated Payments



For school boards that are integrated with an integrated payment solution such as Flywire or Convera, fees can be securely paid directly from the portal.

1. Navigate to **Fees > View Fees**.
2. Click the **Pay** button to begin the payment process.

flywire Integrated Payments

| Reference # School Year | Student Name School Board | Print | Share | Pay | Due Date | Payment Status | Fees |
|----------------------------|---|------------|--|--|---|----------------|-----------|
| 4254 2024-2025 | Brooks, Elle SANDBOX SCHOOL DISTRICT | - Select - |  NOT SHARED |  PAY NOW WITH FLYWIRE | JUN 1, 2024  | | 25,350.00 |

Displaying 1 Fee

 **About Flywire** 

Flywire is our trusted international payment provider, which offers the following benefits:

- Pay in Your Home Currency
- Competitive Rates & Best Price Guarantee
- Void Unexpected Fees
- Payment Tracking Functionality
- 24/7 Multilingual Customer Service

Convera Integrated Payments:

| Reference # School Year | Student Name School Board | Print | Share | Pay | Due Date | Payment Status | Fees |
|----------------------------|---|------------|------------|-----|-------------|----------------|-----------|
| 4254 2024-2025 | Brooks, Elle SANDBOX SCHOOL DISTRICT | - Select - | NOT SHARED | | JUN 1, 2024 | | 25,350.00 |

Displaying 1 Fee

Why choose Convera:

Convera is our trusted partner with secure online international payments, which offers the following benefits:

- Students, parents, and sponsors can use this platform to pay deposits, tuition fees and more
- Avoid costly transaction charges from your bank
- Pay online via popular options including bank transfer, credit, or debit card or eWallet
- Compare payment options instantly and Convera holds the exchange rate for 72 hours
- If you find a cheaper quote from your bank, Convera will match it with their Price Promise Guarantee
- Track your payment status by SMS and email
- Multilingual platform available in 10 languages
- Access 24/7 live chat on the platform or contact our friendly team: studentsupport@convera.com
- A platform built with security in mind so that your money is protected
- Ability to initiate refunds easily should circumstances change
- Pay your fees via a global partner which has been helping students achieve their education dreams for over a decade

Account > Account Details

Account details provide information about the school boards the agent is associated with as well as convenient links to change your password and manage notifications.

Access to School Boards

Each school board manages agent access independently, which requires your name and email address to be associated with an active agency.

Account Details for demo@mytruenorth.ca

Access to the TRUE North Agent Portal has been provided to demo@mytruenorth.ca by following school boards:

| School Board | Agency Name | Agency Contact |
|---------------------------------------|------------------|------------------|
| Sandbox School District | Atomic Tangerine | Norte, Verdadero |
| Red Truck School District | Atomic Tangerine | Norte, Verdadero |
| Sunshine Valley District School Board | Atomic Tangerine | Norte, Verdadero |

[I'm missing a school board from this list.](#)

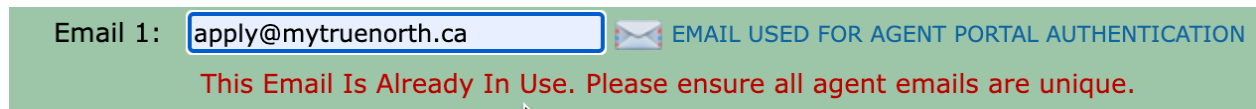
If you are missing access to a specific school board, please contact them directly for assistance.

Duplicate Emails

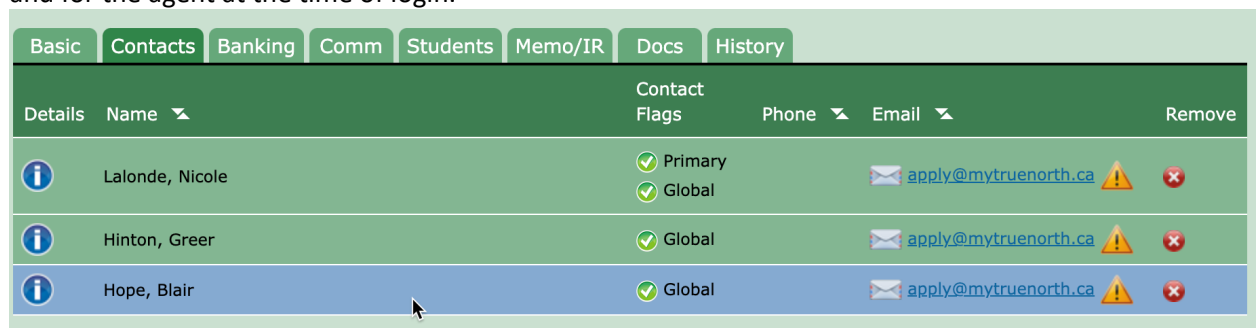
TRUE North recommends all agent contacts have a unique email address. When the same email address is shared among multiple agent contacts and/or different agency names, TRUE North will require clarification on who is signing in, and the unified agent functionality is limited.

All email providers can provide email aliases, which are unique (different) email addresses which deliver all messages to your existing email account. Contact your email provider for assistance.

Since the release of the Unified Agent Portal if a school board attempts to assign the same email address to more than one contact, an error message will occur.



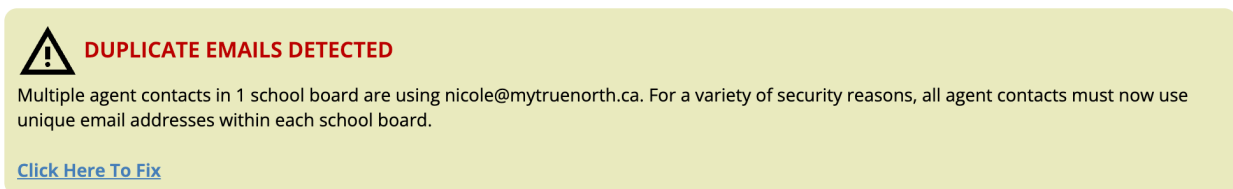
In existing agent contacts a warning message will be displayed for the division inside their Contacts tab and for the agent at the time of login.



| Basic Contacts Banking Comm Students Memo/IR Docs History | | | | | | |
|--|-----------------|-------------------|-------|----------------------|--------|--|
| Details | Name | Contact Flags | Phone | Email | Remove | |
| | Lalonde, Nicole | Primary Global | | apply@mytruenorth.ca | | |
| | Hinton, Greer | Global | | apply@mytruenorth.ca | | |
| | Hope, Blair | Global | | apply@mytruenorth.ca | | |

These warnings can easily be corrected by the agent after they login to their account. Instructions on making corrections and removing duplicate emails are displayed when the Click Here To Fix link is selected.

Welcome to the Agent Portal for Presentation



DUPLICATE EMAILS DETECTED

Multiple agent contacts in 1 school board are using nicole@mytruenorth.ca. For a variety of security reasons, all agent contacts must now use unique email addresses within each school board.

[Click Here To Fix](#)

If an agency plans to use a generic email address to access each school board, it is important for the contacts connected to the agency have a unique email address attached to their names. The generic email can be added as a Global user by the school boards therefore giving agents the ability to work with collaboratively. The correct way for a school board to set up agent contacts if an agency is using a generic email is displayed below.

| Basic | | | | | | Contacts | Banking | Comm | Students | Memo/IR | Docs | History |
|---------|--|---|-------|--|--------|----------|---------|------|----------|---------|------|---------|
| Details | Name | Contact Flags | Phone | Email | Remove | | | | | | | |
| | TRUE North, Team | <input checked="" type="checkbox"/> Primary <input checked="" type="checkbox"/> Global | | applications@mytruenorth.ca | | | | | | | | |
| | Hinton, Greer <small>CLIENT RELATIONSHIP MANAGER</small> | <input checked="" type="checkbox"/> Global | | greer@mytruenorth.ca | | | | | | | | |
| | Hope, Blair | <input checked="" type="checkbox"/> Global | | blair1@mytruenorth.ca | | | | | | | | |
| | Lalonde, Nicole <small>LEARNING AND DEVELOPMENT MANAGER</small> | <input checked="" type="checkbox"/> Global | | nicole1@mytruenorth.ca | | | | | | | | |
| | Schaad, Jason | <input checked="" type="checkbox"/> Global | | jason1@mytruenorth.ca | | | | | | | | |

Change Password

Use the Change Password function to secure your account with a unique and strong password. We recommend the following:

- allow your browser to suggest a strong password (never use a common password).
- save your password with a secure password manager.

Manage Email Notifications

Email notifications are generated from events such as:

- applications expiring soon
- secure messages
- shared documents
- new fees
- overdue fees

Email notification preferences are managed as follows:

Manage Email Notifications

Keep up to date by receiving email notifications for messages and other important changes in the portal.

Portal Message Notifications: WHEN SECURE MESSAGES SENT

Other Portal Notifications: WHEN SECURE DOCUMENTS SENT, NEW/OVERDUE INVOICES EXIST, APPLICATIONS EXPIRING, ETC.

Back
Update Notifications

The following notification options are available:

Immediately: The moment the event happens, you receive an email.

Daily: All notifications are summarized into a single daily email.

Weekly: All notifications are summarized into a single weekly email.

Never: No notifications are emailed, ever.

ABOUT THE "NEVER" OPTION

All email notifications are also displayed in the Agent Portal under the home page Date Sensitive Information. Selecting "Never" as a communication option is only useful if the agent is already accessing the portal on a daily basis and prefers not to receive redundant information.

School Boards rely on the agent being aware of new and actionable events, and it is the responsibility of the agent to either active email notifications or sign-in to the agent portal on a regular basis.

ABOUT "UNSUBSCRIBING"

For compliance with anti-spam legislations, all email notifications contain an unsubscribe link. Clicking the unsubscribe link to effectively set notification preferences to "Never". This can be reversed in the Account Details section of the Agent Portal.

Account > Help

The following resources are available under the Help menu:

Agent Portal Help



[Agent Portal Guide](#)



[How to Share an Application](#)



[How to Share an Invoice](#)