HOW TO MANAGE AGENT DETAILS IN PRISMS

From 1 January 2018 the *National Code 2018* requires all registered providers to maintain a list of their education agents' details in the Provider Registration and International Student Management System (PRISMS) (i.e. for each agent they use and have a written agreement with).

You can manage your agent records in PRISMS by following the instructions below.

This function is available to the following access levels: CoE Administration and CoE Create.

Step 1: At the PRISMS Welcome Page select 'Manage Agent' menu item under the Provider menu from the left hand vertical menu.

Step 2: PRISMS will display the Agents tab

a) All agents linked to your provider will be displayed on your Agents tab. Click on the agent record to view more details.

b) **To delete agent record(s)**. Use the check box to select the agent(s) and click the 'Delete selected agents' button.

c) If you have a long list of agents and want to **search for agent record(s)** that have already been added to your Agents tab, use the 'Search' link above the list.

Step 3: To add an agent that is not on your list of agents on your Agents tab',

- click the 'Add an Agent' button. PRISMS will display the Agent Search screen.

- Enter your search criteria and press the Search button (a valid 'MARA/Overseas Education Agent ID' number will overwrite all other search criteria).

Step 4: PRISMS will display the agent search results.

- ***If an agent is not found.*** Try making your search criteria less specific. If you are sure that the agent does not have an existing record, select the '*Add a new agent'* button (see Step 6).

- ***If a single agent match has been found.*** PRISMS will display the existing agent details. To ensure that the agent found is the required one, check the details of the agent. You can see the full details of the agent by clicking on the record.)

- ***If multiple agent matches have been found.*** PRISMS will display a list of all matching records. Carefully check the list to identify whether the record you require is listed and if so then select the record by clicking on the record. Alternatively, if too many agent records appear you may want to go back to the 'Agent Search' screen and refine your search.

Step 5: Your list of Agents (Agents tab)

To add agents to your list on the Agent tab, use the check box to select the agent(s) and click the 'Add selected agents' button.

PRISMS will display a message to confirm the selected agents have been added.

PRISMS will save the agent record(s) to your 'Agent list' and link the agent record(s) to your provider code, select the OK button on the confirmation page.

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Step 6: Add a new agent

- To create a new agent record, click the 'Add a new agent' button. PRISMS will display the 'Manage Agent' screen.

- Ensure that the agent has not already been recorded in PRISMS before you create a new agent record.

- Once you have entered the required data, click the *'Save'* button. PRISMS will save the new agent record and link the agent to the provider code, select the OK button on the Confirmation page.

Fields on this screen:

MARA/Overseas Education Agent ID - This field is for the 7 digit unique MARA/Overseas Education Agent ID for the Agent. Only enter data for this field if known. This field is not a mandatory field.

Business Name - This field is mandatory. It is important to ensure that you fill out the business name details accurately as this information is checked against the agent data in PRISMS.

Given Name – Enter the First Name for the agent. If the agent has only one name, you must enter it under Family Name field.

Given Name 2 - Enter the other First and Second Name(s) of the agent. If the agent has only one name, you must enter it under Family Name field.

Family Name – This field is mandatory. If the agent has only one name, you must enter it under this field.

Date of Birth - You will be required to enter the agent's birthday. The required format of this date is dd/mm/yyyy where dd is the day, mm is the month and yyyy is the year. This field in not mandatory, leave this field blank if not known.

Email Address - Enter the business/primary contacts email address in this field. Please ensure the correct email format.

Business Phone/Residential Phone/Mobile: At least one phone contact number is mandatory. Enter country code and area code for overseas numbers.

Address: This field is mandatory if you are creating an agent record, if you are about to create an agent already in Australia, choose the country as 'Australia' and enter additional address details (Australian state and postcode).