



Ministry of Colleges and Universities  
Student Financial Assistance Branch

# OSAP Administrative Systems Guide: **Student Inquiry / Profile**

**Audience:**

**Administrative Users with Access to Advanced OSAP Services**



## Version 4

**Release date: January 2023**

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## Document Updates

### **v4 (released: January 2023)**

- Document content refresh for enhanced readability (**all pages**).
- Updated disability information with new Persistent/Prolonged status (pages 25, 39, 40)
- Updated supporting document requirements and process updates (pages 72-75)
- Clarification to new SIN aligned with 2223 FT Policy Manual (page 36)
- Clarification on methods to check application status (page 62)
- Replacement of OCAS reference to ontariocolleges.ca (page 66, 67)
- SIR Check information update – gender removed (page 82)
- Academic Progress updates (page 90)
- Profile document severity status -addition of supdoc 043 (page 77)
- Profile IR instructions (pages 102-105)

### **v3 (released: September 30, 2020)**

- Added Academic Progress “Revert” functionality (pages 85-87)
- Student Hold information added to student profile (pages 99-102)
- Gender options updated to include option 3 “other” (throughout)
- References to the Ontario Tuition Grant (OTG) removed (throughout)
- 085 Supporting documentation update-Removed Certificate of Aboriginal Status as acceptable documentation to verify Indigenous status (page 46)
- Updated instructions for changing permanent disability indicator on profile (pages 36-37)

### **v2 (released: Feb. 24, 2020)**

- Document content refresh for enhanced readability (**all pages**).
- Document now includes an explanation of all fields and functionality located within this portal (**all pages**).
- New citizenship status added: Other – Status Indian (**page 37**)
- Student restrictions information added to the student profile (**pages 72-75**)

- Academic progress information and functionality added to the student profile (**pages 76-83**)
- Section added regarding editing communication requests (**page 87**)
- Re: Communicating Application Change. Section removed in this version as it was specific to the 2018-19 OSAP FT academic year.

***v1 (released: December 2017)***

- existing guide reformatted
- guide updated with new functionality

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## Using this Guide

### Introduction

This guide describes the functionality and pages contained within the ***Student Inquiry OSAP Administrative Portal***. This portal is one of the services found on the ***FAO Dashboard***. This includes student profile details, SIR and OEN check information and a summary of the student's funding applications.

### Audience

This guide is designed for financial aid office staff with advanced access to the OSAP online administrative systems accessed via the ONE-key Portal.

### Assumptions

It is assumed that the user is familiar with OSAP terminology and business processes. A list of common terms and acronyms is included in [Appendix 1: Terms and Acronyms](#).

### Screen Samples

The screen samples in this guide have been compressed to show only the relevant information in the screen. They are for display purposes only and do not correspond to real students. That being said, basic identifiers such as Social Insurance Numbers (SINs) have been masked in the screen captures provided.

### Conventions

In this document:

-  Important notes appear with an information symbol.
-  Warnings appear with a warning symbol.
- Window names appear in ***italics***. Field and section names appear in bold (e.g., **First Name**)
-  New information appears with a new icon

-  An eye symbol indicates a reference to additional information found outside this document. Hyperlinks within the document are presented as blue underlined text.

## **Questions?**

If you have questions specific to processing or functionality that are not addressed in this user guide, send your inquiry to the Student Financial Assistance Branch (SFAB) at: [OSAPFAO.Inquiry@ontario.ca](mailto:OSAPFAO.Inquiry@ontario.ca). This e-mail address is specifically for use by financial aid office staff only.

A few reminders if you are sending a question that is student-specific:

- Include only one student inquiry per each e-mail
- DO NOT include a complete SIN in any e-mails sent
- DO NOT attach any supporting documents with your inquiry

Send your inquiry with the subject line written in the following format:

- Your 4-character school code
- Student's first and LAST name (with last name in all capital letters)
- Student's OSAP Access Number OR Account Number, and
- One-line summary of the nature of the inquiry

Example: EXXX, Donna SMITH, 2X000001: Failed SIR Check

## Search Functionality

### Locating the Student Inquiry Portal

This administrative service is accessed via the ONE-key Portal (<https://www.one-key.gov.on.ca>). It is an advanced OSAP administrative service.

### Searching for a Student Record

There are a variety of search options available to locate a student's record in **Student Inquiry**. This includes searching by:

- OSAP Access Number (OAN)
- Social Insurance Number (SIN)
- Ontario Education Number (OEN)
- Full Name (optional first name)
- Student number
- Parent or Spouse Search - SIN and/or last name (optional first name)

### General Search Tips

- Nine digits are required when searching by **OAN** and **OEN**.
- A minimum of the first six digits is needed for searching by student's **SIN**. However, **parental, or spousal SIN** search requires all nine digits.
- Name searches cannot be done with first name only.
- Search results for **Student Number** are based on an exact (**not** partial) match.
- Reminder: Both **OEN** and **Student Number** are optional profile fields. The student may not have included this information in their profile, which will impact your search results.

### Search Results Presentation

The results and screen flow to the student's profile differ based on the search parameters used.

### Search Results - Unique

Unique results are generated with searches using **SIN**, **OAN** or **OEN**.

Unique results will bring you directly to the **Student Summary** corresponding to the search parameter entered.

### Search Results: Non-Unique

Non-unique (multiple) results can be generated with searches using **Last Name** or **Student Number**.

Basic information will be displayed for each student matching the search results. Use this to help locate the student's profile you're looking for.

The results will include the following for each student:

- First and last name.
- OAN, OEN or SIN. Use the dropdown list at the top of the column to select your preferred display.
- Student's permanent address.
- A **SELECT** link that leads to their **Student Summary**.

| Search Results for: st |            |        |                                               |                    |
|------------------------|------------|--------|-----------------------------------------------|--------------------|
| First Name:            | Last Name: | OAN: ▾ | Address:                                      | Action:            |
|                        |            |        | 446 RED CARPET RD OSCAR ON<br>CA L3N4M3       | <b>SELECT &gt;</b> |
|                        |            |        | 189 Red River Rd Thunder Bay ON<br>CA P7B6G9  | <b>SELECT &gt;</b> |
|                        |            |        | 189 Red River Rd Thunder Bay ON<br>CA P7B6G9  | <b>SELECT &gt;</b> |
|                        |            |        | 189 Red River Rd Thunder Bay ON<br>CA P7B6G9  | <b>SELECT &gt;</b> |
|                        |            |        | 189 Red River Rd, Thunder Bay<br>ON CA P7B6G9 | <b>SELECT &gt;</b> |

### Search Results Based on Parental or Spousal Information

Parental or spousal information is included when either of these search parameters are used.

The search results will include:

- First and last name of the parent or spouse.
- The student's SIN, OEN or OAN (based on results preference selected from the dropdown list at the top of the column)
- Student's first and last name
- A **SELECT** link that leads to their **Student Summary**.

| Search for a Student    |                   |                   |               |                     |
|-------------------------|-------------------|-------------------|---------------|---------------------|
| Search By:              |                   |                   |               | Action:             |
| Search By:              | Parent Search     |                   |               | SEARCH ><br>CLEAR > |
| SIN:                    |                   |                   |               |                     |
| First Name:             |                   |                   |               |                     |
| Last Name:              | bea               |                   |               |                     |
| Search Results for: bea |                   |                   |               |                     |
| Parent First Name:      | Parent Last Name: | Student<br>OAN: ▾ | Student Name: | Action:             |
|                         | BEA               |                   |               | SELECT >            |
|                         | BE                |                   |               | SELECT >            |
|                         | Be                |                   |               | SELECT >            |
|                         | Be                |                   |               | SELECT >            |
|                         | BE                |                   |               | SELECT >            |
|                         | Be                |                   |               | SELECT >            |
|                         | BE                |                   |               | SELECT >            |
|                         | Be                |                   |               | SELECT >            |
|                         | BE                |                   |               | SELECT >            |
|                         | BEA               |                   |               | SELECT >            |

## Recently-Accessed Student Applications

**Recently Accessed** presents a list of the 10 most recent student profiles that you accessed.

Access this feature on the left navigation bar within **Student Inquiry**.

Each row on the **Recently Accessed Students** list will include the student's:

- last and first name
- their OAN, OEN or SIN (depending on the preference selected from the dropdown list at the top of the column)
- student's **mailing address**
- the date you last accessed the record
- A **SELECT** link that leads to their **Student Summary**.

| Recently Accessed Students |             |        |          |                      |          |
|----------------------------|-------------|--------|----------|----------------------|----------|
| Last Name:                 | First Name: | SIN: ▾ | Address: | Last Accessed:       | Action:  |
|                            |             |        |          | Nov 21, 2022 11:17AM | SELECT > |
|                            |             |        |          | Oct 31, 2022 3:01PM  | SELECT > |
|                            |             |        |          | Oct 27, 2022 2:48PM  | SELECT > |
|                            |             |        |          | Oct 25, 2022 2:39PM  | SELECT > |
|                            |             |        |          | Oct 25, 2022 2:28PM  | SELECT > |
|                            |             |        |          | Oct 25, 2022 2:23PM  | SELECT > |

# Student Summary

## Introduction

The **Student Summary** is your main access point to the student's profile information and funding application activity.

**Student Summary** includes:

- An information banner that contains the student's basic identifiers as well as a link to their academic summary.
- Profile alerts/messages (if applicable).
- The profile status when the student's profile is incomplete.
- A list of all funding programs the student has applied for.
- Direct access to other administrative portals corresponding to funding applications the student has created.

| Student Profile                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|---------------------|--------|-----------|-------------------------------------------|----------------------|-------------------------------------------|-----------|-------------------------------------------|-----------|-------------------------------------------|------|--|
| November 21, 2022 2:07 PM                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | User: User Guide Demo        |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| <b>Work With Student Profile</b> ▾<br>▶ Student Summary<br>▶ Student Profile Details<br>▶ Profile Documentation<br>▶ SIR Check Details<br>▶ OEN Check Details<br>▶ Student Restrictions<br>▶ Academic Progress | <b>Student Summary</b><br><table border="1"> <thead> <tr> <th colspan="2">Student Information</th> <th>Action:</th> </tr> </thead> <tbody> <tr> <td>Name:</td> <td><input type="text"/></td> <td rowspan="4"><b>ACADEMIC SUMMARY &gt;</b></td> </tr> <tr> <td>SIN:</td> <td></td> </tr> <tr> <td>OAN:</td> <td></td> </tr> <tr> <td>OEN:</td> <td></td> </tr> </tbody> </table>                                                                                                                             |                              | Student Information |        | Action:   | Name:                                     | <input type="text"/> | <b>ACADEMIC SUMMARY &gt;</b>              | SIN:      |                                           | OAN:      |                                           | OEN: |  |
| Student Information                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Action:                      |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| Name:                                                                                                                                                                                                          | <input type="text"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>ACADEMIC SUMMARY &gt;</b> |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| SIN:                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| OAN:                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| OEN:                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| <b>Administrative Functions</b> ▾<br>▶ Student Communications<br>▶ Enter Application<br>▶ Reset Password<br>▶ Student Profile Comments<br>▶ Student Hold                                                       | <b>Application(s)</b><br>CoreFT ▾<br><table border="1"> <thead> <tr> <th>Year</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>2022-2023</td> <td>WORK WITH &gt;<br/>VIEW FAO STUDENT INQUIRY &gt;</td> </tr> <tr> <td>2021-2022</td> <td>WORK WITH &gt;<br/>VIEW FAO STUDENT INQUIRY &gt;</td> </tr> <tr> <td>2020-2021</td> <td>WORK WITH &gt;<br/>VIEW FAO STUDENT INQUIRY &gt;</td> </tr> <tr> <td>2019-2020</td> <td>WORK WITH &gt;<br/>VIEW FAO STUDENT INQUIRY &gt;</td> </tr> </tbody> </table> |                              | Year                | Action | 2022-2023 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > | 2021-2022            | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > | 2020-2021 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > | 2019-2020 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |      |  |
| Year                                                                                                                                                                                                           | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| 2022-2023                                                                                                                                                                                                      | WORK WITH ><br>VIEW FAO STUDENT INQUIRY >                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| 2021-2022                                                                                                                                                                                                      | WORK WITH ><br>VIEW FAO STUDENT INQUIRY >                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| 2020-2021                                                                                                                                                                                                      | WORK WITH ><br>VIEW FAO STUDENT INQUIRY >                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| 2019-2020                                                                                                                                                                                                      | WORK WITH ><br>VIEW FAO STUDENT INQUIRY >                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |
| <b>Student Inquiry</b> ><br><b>References</b> ><br><b>Help</b>                                                                                                                                                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                              |                     |        |           |                                           |                      |                                           |           |                                           |           |                                           |      |  |

## Student Information Banner

The **Student Information** banner is found at the top of all Student Inquiry screens. It includes the following information about the student:

- first and last name
- Social Insurance Number (SIN)
- OSAP Access Number (OAN)
- Ontario Education Number (OEN) – if provided

| Student Information |                      | Action:            |
|---------------------|----------------------|--------------------|
| Name:               | <input type="text"/> | ACADEMIC SUMMARY > |
| SIN:                |                      |                    |
| OAN:                |                      |                    |
| OEN:                |                      |                    |

The **Academic Summary** link is included in the banner on **Student Summary** only.

## Academic Summary

**Academic Summary** lists all funding applications the student has submitted as well as whether the study period has been confirmed.

Each entry row provides the following information:

- The funding application type.
- The academic year corresponding to the application.
- The school name and corresponding institution code.
- Study start and end dates.
- The confirmation status of the study period (yes or no)

| Academic Summary |                |                                |                            |            |                                           |
|------------------|----------------|--------------------------------|----------------------------|------------|-------------------------------------------|
| FI:              | Academic year: | Institution:                   | Study Period(s):           | Confirmed: | Action:                                   |
| CoreFT           | 2022-2023      | EUAL<br>LAKEHEAD<br>UNIVERSITY | Aug 1, 2022 - Apr 18, 2023 | Yes        | SELECT ><br>VIEW FAO STUDENT<br>INQUIRY > |
|                  |                |                                | Not Specified              | No         |                                           |
| CoreFT           | 2021-2022      | EUAL<br>LAKEHEAD<br>UNIVERSITY | Sep 1, 2021 - Apr 20, 2022 | No         | SELECT ><br>VIEW FAO STUDENT<br>INQUIRY > |

If your administrative access includes the institution corresponding to the application, the following links may appear in the action column:

- **SELECT:** brings you to **Application Inquiry** search results for the funding application's administrative portal.
- **VIEW FAO STUDENT INQUIRY:** brings you the **FAO Student Inquiry Portal** search results for the student.

## Alerts/Messages

One or more alerts may appear below the **Student Information Banner**. They can flag the existence of:

- Profile comments.
- Student restriction(s) and/or loan overpayments.
- BRS system entries.

- Interest relief and claims
- Academic Progress Information
- OTG/OSG-Base Terms

The message may include a link within the alert. For example, “Profile **Comments** Exist” provides a direct link to **Student Profile Comments**.

| Student Summary                                                                                                                                                                                                                                                        |                     |         |       |                    |      |      |      |                                                                                                                                                                                                                                                     |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|---------|-------|--------------------|------|------|------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <table border="1"> <thead> <tr> <th>Student Information</th> <th>Action:</th> </tr> </thead> <tbody> <tr> <td>Name:</td> <td rowspan="4">ACADEMIC SUMMARY &gt;</td> </tr> <tr> <td>SIN:</td> </tr> <tr> <td>OAN:</td> </tr> <tr> <td>OEN:</td> </tr> </tbody> </table> | Student Information | Action: | Name: | ACADEMIC SUMMARY > | SIN: | OAN: | OEN: | <ul style="list-style-type: none"> <li>• Academic Progress Information Exists</li> <li>• OTG/OSG-Base Terms</li> <li>• Profile <b>Comments</b> Exist</li> </ul>  |
| Student Information                                                                                                                                                                                                                                                    | Action:             |         |       |                    |      |      |      |                                                                                                                                                                                                                                                     |
| Name:                                                                                                                                                                                                                                                                  | ACADEMIC SUMMARY >  |         |       |                    |      |      |      |                                                                                                                                                                                                                                                     |
| SIN:                                                                                                                                                                                                                                                                   |                     |         |       |                    |      |      |      |                                                                                                                                                                                                                                                     |
| OAN:                                                                                                                                                                                                                                                                   |                     |         |       |                    |      |      |      |                                                                                                                                                                                                                                                     |
| OEN:                                                                                                                                                                                                                                                                   |                     |         |       |                    |      |      |      |                                                                                                                                                                                                                                                     |

## Profile Status

**Profile status** will appear in the case of the following reasons:

- An incomplete basic profile
- Outstanding or denied profile documentation
- SIR Check with a status of either In Progress or Denied

| Profile Status         |              |            |         |
|------------------------|--------------|------------|---------|
| Description:           | Date:        | Status:    | Action: |
| Profile Complete:      | Mar 22, 2022 | Incomplete | VIEW >  |
| Profile Documentation: | Nov 21, 2022 | Incomplete | VIEW >  |

Each status row will include a **VIEW** action link. Click on **VIEW** located at the end of the row to get further information on the item listed.

| Permanent Canadian Address ▼                                                                            |              | Incomplete |
|---------------------------------------------------------------------------------------------------------|--------------|------------|
| Street name and number, rural route, or post office box:                                                | 346 Snowy Rd | EDIT >     |
| Apartment:                                                                                              |              |            |
| City, town, or post office:                                                                             | Snowbank     |            |
| Province:                                                                                               | Ontario      |            |
| Postal code:<br>Enter without space or dash (e.g., P0T2E0)                                              | P0L1N0       |            |
| Telephone number:<br>Enter all 10-digits including the area code and telephone number (e.g. 4165551212) |              |            |

## Application(s)

A row is added on the **Student Summary** for each funding application type and academic year the student created. This includes both submitted applications as well as unsubmitted applications they have started.

The line item may also include access or details on the administrative service(s) where the application details are held. This can include:

- **Work With**
- **View FAO Student Inquiry**
- **LOB only**

| Application(s) |           |                                           |
|----------------|-----------|-------------------------------------------|
| CIFS ▼         |           |                                           |
|                | 2022-2023 | WORK WITH >                               |
|                | 2021-2022 | WORK WITH >                               |
|                | 2020-2021 | WORK WITH >                               |
| CoreFT ▼       |           |                                           |
|                | 2021-2022 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
|                | 2020-2021 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
|                | 2019-2020 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
|                | 2018-2019 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
|                | 2017-2018 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
|                | 2005-2006 | LOB ONLY                                  |
| CoreMC ▼       |           |                                           |
|                | 2020-2021 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
| CorePT ▼       |           |                                           |
|                | 2020-2021 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
|                | 2018-2019 | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |

## Work With

**Work With** goes to **Application(s)** within the administrative portal corresponding to the application.

| Application(s)             |                   |            |                      |                             |          |
|----------------------------|-------------------|------------|----------------------|-----------------------------|----------|
| Institution                | Application Type  | Student #: | Confirmation Status: | Study Period:               | Action   |
| EUAL - LAKEHEAD UNIVERSITY | Paper - Submitted |            | Not Eligible         | Aug 22, 2022 - Feb 15, 2023 | SELECT > |

A **SELECT** action link will display within **Application(s)** if your access includes the institution assigned to the application. **SELECT** goes to the account's **Processing Summary**.

### View FAO Student Inquiry

**View FAO Student Inquiry** will be presented if the application Information is available in the FAO Student Inquiry portal.

### LOB Only

**LOB ONLY** refers to the previous non web-based administrative system used for application processing. LOB stands for "Line of Business". This AS/400-based system is also referred to as the "green screens".

## Student Profile

### **What is a Student Profile?**

The student profile (record) is a central repository of information about a defined OSAP client (typically a student). Funding applications and other OSAP administrative systems draw on this profile information.

The profile includes:

- Basic personal information including the student's name and contact information
- Whether the student has authorized others to access their account information.
- "Additional" profile fields that, while unique to the student, are not required for all funding applications. Examples: status with Children's Aid Society, francophone self-identification.
- Profile documentation status.
- SIR and OEN (third-party check) details.

### **How Profile Information is Used**

Funding applications draw from the information in the student profile as required.

If additional profile fields are required for the application, they are added to the application flow.

### **Timing for Profile Creation**

A profile is created from any one of the following events:

- [New user registration](#) on the OSAP website.
- First time submission of a funding [application in paper format](#).
- As a result of the [migration of existing student information](#) from the line of business prior to the April 2014 student profile launch.

In all instances when a profile is created, an OSAP Access Number (OAN) is assigned to the student's Social Insurance Number.

### **OSAP Website New User Registration**

A profile is created once the following information is submitted during the web-based New user registration flow:

- User's first and last name.
- Birthdate and gender.
- SIN (mandatory) and OEN (optional).
- OSAP password.
- Challenge questions (2) and answers (2).

Once all field validations are satisfied, the user is presented with their OAN. Even though the profile is now created, it is still incomplete.

The remaining basic profile field details are collected in New user registration flow. Part of the collection can be achieved by [linking to information provided on an ontariocolleges.ca or OUAC application](#).

### Submission of Paper Application

Since April 2014, all paper versions of funding applications include the OSAP User Agreement and profile fields. The profile fields must be completed, and the user agreement must be signed on the paper application even if the student already has an existing profile.

The following fields are **not** collected as part of the paper application:

- Email address
- Communications preferences (It will default to paper if there is not a pre-existing response on the profile).
- OSAP password
- Challenge questions and answers

Only the student can add/edit the above fields by logging into their OSAP account.

### Migration of Information from the LOB

The web-based profile was introduced in April 2014.

To secure student information held by the ministry, profile records were created based on previously submitted applications. Profiles created in this scenario are identified with **User = Data Migration** in **Student Profile Audit**.

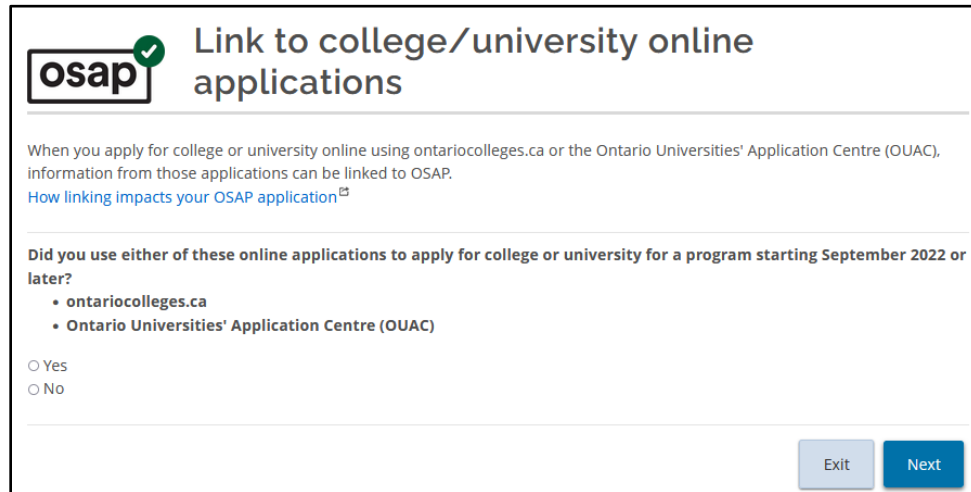
Profiles were also created from funding applications that no longer exist. Examples: Explore, TTG (Textbook and Technology Grant).

The information collected by the older applications varied. A profile created by data migration could contain only a SIN and OAN, but no other details. These partial profiles are all still valid profiles.

See section, [Password Reset](#), for further information on working with profiles that contain only a SIN and OAN.

## Collecting Basic Profile Field Details via ontariocolleges.ca and/or OUAC Linking

During the registration flow, the user is asked whether they applied for college or university using either an online ontariocolleges.ca or OUAC application for the current academic year.

The screenshot shows a web form titled "Link to college/university online applications" with the OSAP logo. The text explains that information from online applications can be linked to OSAP and provides a link to "How linking impacts your OSAP application". It then asks, "Did you use either of these online applications to apply for college or university for a program starting September 2022 or later?" with bullet points for "ontariocolleges.ca" and "Ontario Universities' Application Centre (OUAC)". There are radio buttons for "Yes" and "No". At the bottom right are "Exit" and "Next" buttons.

**osap** Link to college/university online applications

When you apply for college or university online using ontariocolleges.ca or the Ontario Universities' Application Centre (OUAC), information from those applications can be linked to OSAP.  
[How linking impacts your OSAP application](#)

Did you use either of these online applications to apply for college or university for a program starting September 2022 or later?

- ontariocolleges.ca
- Ontario Universities' Application Centre (OUAC)

☐ Yes  
☐ No

Exit Next

A secondary question gives them the option to link the information provided on their ontariocolleges.ca and/or OUAC applications to their profile.

Linking their ontariocolleges.ca/OUAC information triggers two actions:

- Their basic profile fields will be pre-filled with information provided to ontariocolleges.ca and/or OUAC. They can modify the details as needed during the New user registration flow.
- An OSAP application will be created and pre-filled for each program included on their ontariocolleges.ca and/or OUAC application. If the program had an unlinked cost code, an application is still created for the school. The student would enter the program details.

## Student Profile Challenge Questions

Challenge questions are created by the student during the web-based New user registration. The student can use the responses to retrieve their OAN and/or reset the password on their OSAP account.

Neither the questions nor the answers are displayed in the profile details on **Student Inquiry**.

The challenge questions and answers are only accessible to the student. The student can change their questions and/or responses by logging into their OSAP account.

## Overview: Student Profile Details

### Introduction

This chapter provides an overview of:

- The profile field classifications.
- Actions presented on **Student Profile Details**.
- Information available in **Student Profile Audit**.

### Profile Information Classifications

There are two general categories of profile information fields:

- [Basic profile information](#).
- [“Additional” profile information](#).

### Basic Profile Information Fields

Basic profile information, such as the student's name, address, and SIN, is used by all funding applications.

Basic profile fields have either [mandatory](#) or [optional](#) responses.

#### Basic Profile Fields with Mandatory Responses

- SIN
- First and last name
- Birth date
- Gender
- Permanent Canadian and mailing addresses
- Communication preferences (format and language)

#### Basic Profile Fields with Optional Responses

- Ontario Education Number (OEN)
- Email address
- Access to information (FOI)
- Student linking to ontariocolleges.ca and/or OUAC

### Additional Information Fields

Some additional profile fields are not needed/not used by all funding applications.

If the application requires one or more of these additional profile fields, it is requested as part of the application process. The responses provided are then added to the student's existing profile.

The additional profile fields are:

- Last high school date
- Permanent disability status or;
-  Persistent or prolonged disability status
- Citizenship status
- Status with Children's Aid Society
- Francophone status
- Indigenous self-identification status

 For the 2022-23 academic year, the persistent or prolonged disability (PPD) status option is recognized only in the federal need assessment.

| Additional Information                                                                                   |                                                                                                                                             |
|----------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| When did/will you graduate or last attend full-time high school?<br><i>What is full-time high school</i> | Month <input type="text"/> Year <input type="text"/>                                                                                        |
| Do you want to self-identify as a student with a disability?                                             | <input checked="" type="radio"/> Yes<br><input type="radio"/> No                                                                            |
| Is your disability permanent<br><i>Understanding disability statuses</i>                                 | <input type="radio"/> Yes<br><input checked="" type="radio"/> No                                                                            |
| Is your disability persistent or prolonged?                                                              | <input type="radio"/> Yes<br><input type="radio"/> No  |

## Profile Details Actions

There are three different actions that can be presented on **Student Profile Details**:

- Edit
- Work With <field name>
- Request Email Validation

### Edit

"Edit" allows you to update existing information. The change is not effective date based.

Supporting documentation may be required before making the change. See section, [Profile Field Requirements and Supporting Documents](#) for details.

If the student requested the change through their online account, the field will be marked as **\* Change Requested**. This is an indicator that a supporting documentation requirement has been set.

| Student Profile Details                     |                      |                   |                                                  |
|---------------------------------------------|----------------------|-------------------|--------------------------------------------------|
| Basic Personal Information ▾                |                      |                   | Complete                                         |
| First name:                                 | <input type="text"/> |                   | <b>EDIT &gt;</b><br><b>WORK WITH GENDER &gt;</b> |
| Last name:                                  | <input type="text"/> |                   |                                                  |
| Date of birth:                              | January 1, 1975      | *Change Requested |                                                  |
| Gender:                                     | <input type="text"/> |                   |                                                  |
| Social Insurance Number (SIN):              | <input type="text"/> |                   |                                                  |
| Ontario Education Number (OEN):             |                      |                   |                                                  |
| What is an OEN<br>This question is optional |                      |                   |                                                  |

## Work With <field name>

“Work with” indicates the field change can be done as of an effective date. These point-in-time changes prevent a reassessment of prior applications that the change does not apply to.

Fields containing an effective date change are identified with an exclamation mark to the right of the field response.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                             |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|
| Do you want to self-identify as a student with a disability?<br><br>Students who self-identify as having a permanent disability may be eligible for additional funding. Students who self-identify as having a persistent or prolonged disability may be eligible for additional funding beginning in 2022-23—see the “Understanding disability statuses” link for details. You will be required to provide supporting documentation that validates the disability.<br><a href="#">Understanding disability statuses</a> | Yes – Permanent <!<br> |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|

## Request Email Validation

Students who forget their OAN and/or password have self-service options to quickly retrieve the information needed:

- Online using their [challenge questions](#)
- By email

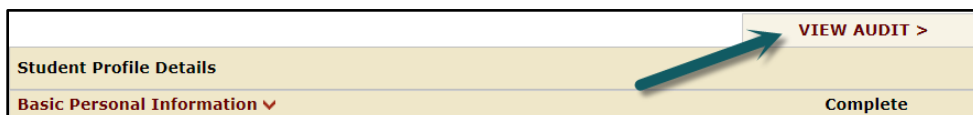
To use the email option, the current email address on the profile must have a **Validation status = Validated**.

An email validation code is triggered when the student logs into their online account. However, you can also trigger the validation code using the **Request Email Validation** action.

See section, [Email Validation Status](#) for complete details on the email validation process, including using [Request Email Validation](#).

## Profile Audit

To access the profile audit, click **View Audit** located on the top right corner of **Student Profile Details**.



This section will highlight information found in **Student Profile Audit**.

## Profile Creation Audit Details

The **User** details displayed at the beginning of **Student Profile Audit** indicates how the initial profile was created.

- **User** = Student: The student created the profile through their online OSAP account
- **User** = <user name>: the profile was created during the entry of a paper application by an administrative user. Entry was done on one of the administrative portals.
- **User** = Data Migration: The profile was created as part of the [data migration from the LOB](#).

| Student Profile Audit   |                                         |               |                |         |
|-------------------------|-----------------------------------------|---------------|----------------|---------|
| Date and Time: ▼        | Field Name: ▲                           | Before Value: | After Value:   | User:   |
| Nov 22/2022<br>12:56 PM | FOI Individual:<br><input type="text"/> |               | Added - View > | Student |
| Nov 22/2022<br>12:56 PM | Address                                 |               | Created        | Student |
| Nov 22/2022<br>12:56 PM | Additional Info                         |               | Created        | Student |
| Nov 22/2022<br>12:56 PM | FOI Information                         |               | Created        | Student |
| Nov 22/2022<br>12:56 PM | Email & Correspondence                  |               | Created        | Student |
| Nov 22/2022<br>12:53 PM | Agreement flag                          |               | Yes            | Student |
| Nov 22/2022<br>12:53 PM | Basic Profile                           |               | Created        | Student |

## Profile Agreement Flag Audit Details

Through the OSAP User Agreement, the student agrees to:

- The collection, use and disclosure of their personal information. This includes providing access to financial aid office staff.
- Keeping their profile information update to date.

- Providing documentation for specific profile change requests.

After providing their consent, the existence of the profile, as well as all information contained in it is accessible to any administrative user.

### How to Locate the Agreement Flag Audit Details

The student's consent to the OSAP User Agreement is found only within the **Student Profile Audit**. If the student has provided their consent, the **Agreement flag** will have an **After Value** = Yes.

|                         |                        |                                                                                   |         |         |
|-------------------------|------------------------|-----------------------------------------------------------------------------------|---------|---------|
| Nov 22/2022<br>12:56 PM | Email & Correspondence |                                                                                   | Created | Student |
| Nov 22/2022<br>12:53 PM | Agreement flag         |  | Yes     | Student |
| Nov 22/2022<br>12:53 PM | Basic Profile          |                                                                                   | Created | Student |

Profiles created during the original [LOB data migration](#) did not have a completed agreement. Consent may have been provided post-migration in either of the following scenarios:

- The student logged into their OSAP account and completed the agreement. The student would not be able to proceed to their account details without first completing this step.
- A paper application completed by the student after the launch of the Student Profile in April 2014.

| Student Profile Audit  |                                     |               |                                                                                                |                |
|------------------------|-------------------------------------|---------------|------------------------------------------------------------------------------------------------|----------------|
| Date and Time: ▼       | Field Name: ▲                       | Before Value: | After Value:                                                                                   | User:          |
| Mar 01/2017<br>1:21 PM | E-Mail Address                      |               | pete.moss@mailinator.com                                                                       | Student        |
| Mar 01/2017<br>1:21 PM | FOI allow access                    |               | No        | Student        |
| Mar 01/2017<br>1:19 PM | Agreement flag                      |               | Yes                                                                                            | Student        |
| Apr 03/2014<br>2:10 PM | Last attended high school full time | 604           | Jun/2004  | Data Migration |

You will get a search result of **No record is found** for LOB data migration-created profiles that do not have a completed agreement.

You will not be able to retrieve the student's OAN and/or reset their password in this scenario. A student must complete the **OSAP Website: Forgot Password and/or OSAP Access Number** form and send it to the ministry for processing.

### Effective Date Entry Audit Details

Enhanced audit details are displayed for effective date changes:

- The **Field Name** entry will include the effective date assigned to the change
- The **After Value** includes a toggle link to **View** details specific to this change. Click **View** to reveal the additional details

| Student Profile Audit  |                          |               |                                |                           |
|------------------------|--------------------------|---------------|--------------------------------|---------------------------|
| Date and Time: ▼       | Field Name: ⬆            | Before Value: | After Value:                   | User:                     |
| Nov 22/2022<br>2:10 PM | Effective Date           |               | Added - <a href="#">View</a> ▼ | User Guide<br>Demo (EUAL) |
|                        | Disability: Sep 07, 2022 |               |                                |                           |
|                        | Disability               |               | Yes - Permanent                |                           |

## Access Information (FOI) Audit Details

Any changes to FOI details are included in **Student Profile Audit**. This includes individuals who were previously provided access by the student but have been removed.

| Student Profile Audit  |                  |               |                                  |                           |
|------------------------|------------------|---------------|----------------------------------|---------------------------|
| Date and Time: ▼       | Field Name: ⬆    | Before Value: | After Value:                     | User:                     |
| Nov 22/2022<br>2:16 PM | FOI Individual:  |               | Deleted - <a href="#">View</a> ▼ | User Guide<br>Demo (EUAL) |
|                        | First Name       |               |                                  |                           |
|                        | Last Name        |               |                                  |                           |
|                        | Birth Date       | Nov 01, 1989  |                                  |                           |
|                        | Expiry Date      | Nov 22, 2027  |                                  |                           |
| Nov 22/2022<br>2:16 PM | FOI allow access | Yes           | No                               | User Guide<br>Demo (EUAL) |



Always verify the current access authorization on **Student Profile Details** before releasing information to anyone other than the student.

## **Profile Field Requirements and Supporting Documents**

### **Introduction**

This chapter will review each profile field in detail. This includes:

- A brief explanation of the field, including whether it is considered a basic personal identifier (BPI) field
- Field validations
- Documentation requirements, if any, during profile creation or to update an existing response
- The process to update an existing response
- When and how to do an effective date change

### **What are the BPI Profile Fields?**

Select profile fields contain information that is referred to as a basic personal identifier (BPI). The BPI fields are:

- First and last name
- Birth date
- Gender
- Last high school date
- Disability status
- Citizenship status
- Status with the Children's Aid Society
- Indigenous self-identification status

Most of the information is verified by the [Social Insurance Registry \(SIR\) check](#) or through documentation provided by the student.

### **Changes to BPI Field Information**

The student cannot change existing information in a BPI field through their online account. Instead, the student clicks a box to indicate a change is required. This triggers two actions:

- A document requirement is created so you can verify the request is valid.
- **Student Profile Details** will flag the field as having an outstanding change requested.

## Profile Field Requirements and Supporting Documents

| Basic Personal Information ▼                |                                    | Complete                                         |
|---------------------------------------------|------------------------------------|--------------------------------------------------|
| First name:                                 | <input type="text"/>               | <b>EDIT &gt;</b><br><b>WORK WITH GENDER &gt;</b> |
| Last name:                                  | <input type="text"/>               |                                                  |
| Date of birth:                              | November 1, 1996 *Change Requested |                                                  |
| Gender:                                     | Female                             |                                                  |
| Social Insurance Number (SIN):              | <input type="text"/>               |                                                  |
| Ontario Education Number (OEN):             |                                    |                                                  |
| What is an OEN<br>This question is optional |                                    |                                                  |

 You must have acceptable supporting documentation before making any changes to a BPI profile field.

Complete details are found in the section, [Working with Profile documentation](#).

### First Name/Last Name

First and last name are both mandatory profile fields.

The first and last name are verified as part of the Social Insurance Registry (SIR) check.

No documentation is required for either field when the profile is created. However, a change request for either field will trigger a BPI documentation requirement.

Changes made to either of these fields will trigger a new SIR check.

### Field Validations

The response cannot include numbers.

A period, comma, hyphen, or apostrophe is okay. No other symbols (e.g., #, &, @ or \*) are allowed.

French characters (e.g., É, é, ç) will not reject. However, they will convert to the English keyboard (e.g., E, e, c) upon submit.

### Suppdoc 028: Name Change (BPI)

- A letter from the student that indicates their correct name.
- A copy of one of the following documents:
  - The student's Social Insurance Number card or Social Insurance Number confirmation letter showing their correct name.
  - A Change of Name Certificate issued by the province where the legal name change was processed.
  - The student's marriage certificate. One of the names listed on the certificate must match the change the student is requesting.

See section, [Process: Updating the Status of Category 2 Required Documents](#) for the steps when working with submitted documentation.

### **Date of Birth**

Date of birth is a mandatory field.

The birth date is verified as part of the Social Insurance Registry (SIR) check.

No documentation is required for this field when the profile is created unless the birth date entered would make the student less than 11 years of age.

A change request for this field will trigger a BPI documentation requirement.

A change to this field will trigger a new SIR check.

### **Field Validations**

The month, day and year fields must be specified.

The date entered must be a valid date. It cannot be future-dated.

### **Suppdoc 027: Date of Birth Less than 11 years of age**

A copy of the student's birth certificate to verify student is, in fact, under the age of 11.

See section, [Process: Updating the Status of Category 1 Required Documents](#) for the steps when working with submitted documentation.

### **Suppdoc 029: Date of Birth Change (BPI)**

Student must provide a copy of one of the following to provide their actual date of birth:

- Birth certificate
- The front and back of their Permanent Resident Card
- Record of Landing (IMM 1000) or earlier document, such as a Canadian Immigrant Information Card
- Confirmation of Permanent Residence
- Valid Protected Persons Status Document (issued prior to January 1, 2013)
- Valid Refugee Travel Document

See section, [Process: Updating the Status of Category 2 Required Documents](#) for the steps when working with submitted documentation.

### Gender

Gender is a mandatory field.

No documentation is required for this field when the profile is created. However, a change request will trigger a BPI documentation requirement.

Changes can be made as of the profile creation date or as of an effective date change.

### Field Validations

The field response is selected via radio buttons. The selection options are:

- Male
- Female
- Other (for example, Trans, Non-Binary, Two-Spirit, Binary people, and people who prefer not to disclose their gender identity).

### Suppdoc 030: Gender Change (BPI)

Student must provide a letter confirming they want a change to the gender listed on their OSAP profile.

### Work with Gender Change Options

There are two options to change the gender response:

- [Changing the original information](#) provided as of the profile creation date (**EDIT**)
- Entering an [effective date](#) (point in time) change.

| Work With Gender                      |        |                  |
|---------------------------------------|--------|------------------|
| Effective Date:                       | Value  | Action:          |
| Original                              | Female | <b>EDIT &gt;</b> |
| <b>ADD EFFECTIVE DATE CHANGE &gt;</b> |        |                  |

Make the change only if the documentation provided is acceptable.

### Editing Gender Value as of Original Date

Use **EDIT** to change the original gender value. Use this when an incorrect selection was chosen during the profile creation.

1. From **Student Profile Details**, select **WORK WITH GENDER**.

2. From **Work with Gender**, select **EDIT**.
3. A pop-up window will present warning that the change could impact applications going back as far as 2013-14.
4. Select **OK** to proceed with making the change.
5. Update the gender selection as indicated in the documentation.
6. Click **SAVE** to complete the change.
7. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

### Entering an Effective Date Gender Change

1. From **Student Profile Details**, select **WORK WITH GENDER**.
2. Select **ADD EFFECTIVE DATE CHANGE** from **Work with Gender**
3. Enter the effective date of the change using the drop-down lists. Set the effective date to the date the student requested the change to the gender entry.
4. Choose the gender indicated in the student's correspondence.
5. Click **SAVE** to complete the change.
6. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

### Social Insurance Number (SIN)

Social Insurance Number is a mandatory profile field.

The SIN is verified as part of the Social Insurance Registry (SIR) check.



Once an OAN is assigned to the profile, the SIN cannot be edited.

### Field Validations

The SIN is a 9-digit numeric entry.

The SIN must be valid. Validity is based on an algorithm that is triggered on **SUBMIT**. The same validation is run when the student completes the online New user registration.

If the SIN starts with “9”, a cross validation is done with the citizenship entry. A “9” SIN is valid only if **Citizenship** = Protected Person.

### What to do if the Incorrect SIN is Entered During Profile Creation

There are instances when the wrong SIN is entered during profile creation. Examples include using the SIN of a family member or due to a keystroke error.

Here’s what to do in this scenario:

- Advise the student to complete the New user registration process again using their correct SIN. The student will be assigned a new OAN based on the correct SIN.
- Contact the ministry to request that the profile created with the wrong SIN be deleted. Include a brief description if you know why the wrong SIN was entered (e.g., keystroke error, used the sibling’s SIN).

### What to do if the Student is Assigned a New SIN

A student may be assigned a new SIN by the federal government for any number of reasons, including:

- Student’s citizenship status has changed. If the student originally applied as a Protected Person, their SIN would have started with a “9”. If they become a Canadian citizen or Permanent Resident, they would be assigned a new SIN.
- Security issues. The federal government can re-assign a new SIN due to identity theft or other security breaches.

Here’s what to do when the student is assigned a new SIN:

- The [NSLSC must be notified](#) of the SIN change so the student’s loan accounts can be merged.
- In all cases, the Ministry must be advised when a student is issued a new SIN.
- Whether a new funding application is required for the current study period depends on if their account was [confirmed](#) or [not](#).

#### **Action: Current Study Period Not Yet Confirmed**

- Close the student’s application.
- Advise the student to:
  - Complete the New user registration process using their new SIN
  - Submit a new application using their new OAN

#### **Action: Current Study Period is Confirmed**

If there is a logical break in the study period, such as the end of the term:

- Override the study end date on the current account to the end of the term.
- Advise the student to:
  - Complete the New user registration process using their new SIN
  - Submit a new application for the remainder of their study period using their new OAN.

If there is no logical break in the student's study period:

- Advise the student to complete the New user registration process using their new SIN before they submit any future funding applications.

### How to Notify the NSLSC of SIN Change

To keep the student's prior loans in good standing, it is important that the NSLSC is promptly advised of the SIN change.

For this notification process, the student must provide you with the following:

- A letter advising of their SIN change. The letter must include both their former and current SINs.
- Proof of the new SIN assigned by the federal government (normally a letter from Service Canada).
- Optional: If they have a letter they received about their original SIN, they can include that in their notification package.

Once you've received the student's notification package:

- Upload this documentation as a review.
- Advise your Program Administrator at the ministry that the SIN change package has been uploaded.



See the **2022-23 Full-Time OSAP Policy Manual** for complete details and processing notes on how to handle different **Change of SIN** scenarios.

### Ontario Education Number (OEN)

The OEN is an optional profile field.

The OEN is assigned by the Ministry of Education to Ontario elementary and secondary students.

No documentation is required for this field.

## **Field Validations**

The OEN is 9-digit numeric entry.

The OEN must be valid. Validity is based on an algorithm that is triggered on **SUBMIT**. The same validation is run when the student enters their OEN in their profile.

See the [OEN Check Details](#) chapter for complete details on this third-party validation process.

## **Last High School Date**

Last high school date is an “additional” profile field. It is a required field for the full-time OSAP application.

No documentation is required for this field when it’s first added to the profile. However, a change request will trigger a BPI documentation requirement.

## **Field Validations**

The month and year fields must be specified. They are selected using drop-down lists.

The student’s date of birth must be prior to the date they last attended high school full time.

## **Suppdoc 032: Last High School Date Change (BPI)**

### ***Students Who Did NOT Complete High School as a Mature Student***

The student must provide one of the following:

- A copy of their high school transcript, or
- A letter from their high school indicating the date they last attended or will attend on a full-time basis.

See section, [Process: Updating the Status of Category 2 Required Documents](#) for the steps when working with submitted documentation.

### ***Students Who Completed High School as Mature Students***

If the student completed high school as a mature student, they must provide:

- A copy of their transcripts, or
- A letter from the last high school they attended on a full-time basis prior to their return to high school as a mature student.

For these students only, their last high school date can be updated to reflect when they originally left full-time high school studies.

See section, [Process: Updating the Status of Category 2 Required Documents](#) for the steps when working with submitted documentation.

## Disability Status

Disability status is an “additional” profile field. It’s a mandatory field for both the full-time and part-time OSAP applications.



For the 2022-23 academic year, the persistent or prolonged disability status option is recognized only in the federal need assessment. As a result, if a student with a persistent or prolonged disability has a full course load of at least 40% and less than 60%, they are only considered for federal funding.

| Additional Information <span>Clear Section &gt;</span>                                                                                                                                                                                                                                                                                                                                                                                                              |                                                       |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| When did/will you graduate or last attend full-time high school?<br><b>What is full-time high school</b>                                                                                                                                                                                                                                                                                                                                                            | Month <input type="text"/> Year <input type="text"/>  |
| Do you want to self-identify as a student with a disability?<br><br>Students who self-identify as having a permanent disability may be eligible for additional funding. Students who self-identify as having a persistent or prolonged disability may be eligible for additional funding beginning in 2022-23—see the “Understanding disability statuses” link for details. You will be required to provide supporting documentation that validates the disability. | <input type="radio"/> Yes<br><input type="radio"/> No |

If a student wishes to self-identify as a student with a disability, they will now have the option of selecting a persistent or prolonged disability status.

| Additional Information <span>Clear Section &gt;</span>                                                   |                                                                  |
|----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|
| When did/will you graduate or last attend full-time high school?<br><b>What is full-time high school</b> | June <input type="text"/> 2019 <input type="text"/>              |
| Do you want to self-identify as a student with a disability?                                             | <input checked="" type="radio"/> Yes<br><input type="radio"/> No |
| Is your disability permanent<br><b>Understanding disability statuses</b>                                 | <input type="radio"/> Yes<br><input checked="" type="radio"/> No |
| Is your disability persistent or prolonged?                                                              | <input type="radio"/> Yes<br><input type="radio"/> No            |

Definitions of the available disability statuses can be found by selecting the “Understanding disability statuses” link.

Documentation is required when a student self-identifies as having a permanent disability or a persistent or prolonged disability. However, a change request of any type will trigger a BPI documentation requirement. In subsequent academic

years they will be required to provide an attestation to remain eligible for disability-related supports. As a result, the supdoc approval must be completed from within an application to ensure the relevant academic year is associated with the approval.

### Field Validations

The field response is selected via radio buttons. The selection options are:

- Yes – Permanent
- Yes – Persistent or Prolonged
- Yes – Not Permanent/Persistent/Prolonged
- No



### Suppdoc 043: Persistent or Prolonged Disability Status

Student must submit the following:

- A completed OSAP Disability Verification form
- Documentation as listed on the form to support the disability status.

See section, [Process: Updating the Status of Category 1 Required Documents](#) for the steps when working with submitted documentation.



Students who are approved as having a persistent or prolonged disability through a 2022-23 application will not be required to provide further disability documentation within the 2022-23 academic year.

- For subsequent academic years, students will need to confirm their original persistent or prolonged disability to retain persistent or prolonged disability status and related supports (e.g., CSG-D). Further details on subsequent confirmation will be provided closer to the 2023-24 academic year.

### Suppdoc 048: Permanent Disability Status

Student must submit the following:

- A completed OSAP Disability Verification form
- Documentation as listed on the form to support the disability status.

See section, [Process: Updating the Status of Category 1 Required Documents](#) for the steps when working with submitted documentation.

### Suppdoc 031: Disability Status Change (BPI)

The required documentation depends on the change requested.

If the student wishes to self-identify as having a permanent disability or a persistent or prolonged disability:

- A completed OSAP Disability Verification form
- Documentation as listed on the form to support the disability status.

If student no longer wishes to self-identify as having a permanent or persistent/prolonged disability or selected the wrong response when completing this field:

- Written correspondence indicating they wish their disability status changed for one of the following reasons:
  - They do not want to self-identify as a student with a disability
  - They want to self-identify as a student with a permanent disability
  - They want to self-identify as a student with a persistent or prolonged disability

### **Work with Disability Status Change Options**

There are two options to change disability status:

- [Changing the original information](#) provided from the date the status was added to the profile (**EDIT**)

### **Entering an Effective Date Disability Status Change**

Most **Disability Status** changes will be done using an effective date.

1. From **Additional Information** select **Work with Disability**.
2. From **Work with Disability** select **Add Effective Date Change**.
3. Select the **Effective Date** of the change using the dropdown lists provided. The date is determined based on when the supporting documentation was received for the current application:
4. If the documentation was received **before** the documentation deadline, enter the effective date as the study **start** for the application.
  - If documentation was received **after** the documentation deadline, enter the effective date as the study **end** date plus 1 day.
5. Select the **Value** of the student's disability status.
6. Click **SAVE** to complete the change.

7. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.



See the “Determining PD Effective Date” and the “Determining PPD Effective Date” sections of the **2022-23 Full-Time OSAP Policy Manual** for details on these scenarios.

### Editing Disability Status as of Original Date



Changing disability status as of the original date will trigger a reassessment of **all** of the student’s current and prior funding applications.

**EDIT** can be used to change the original disability status if the student has no other assessed full or part-time applications (has not received any previous full or part-time OSAP funding) **and** one of the following scenarios applies:

- The disability status was entered incorrectly (e.g., during paper application entry).
- Supporting documentation received for code 048 (**Disability Status** = Yes - Permanent) OR 043 (**Disability Status** = Yes – Persistent or Prolonged) was denied.
- Student did not initially self-identify as having a disability. They subsequently submitted a request to be considered as having a permanent or a persistent or prolonged disability. All supporting documentation was received by the application’s documentation deadline and was approved.

To proceed with the edit:

1. From **Additional Information**, select **Work with Disability**.
2. From **Work with Disability** select **EDIT**.
3. A pop-up window will present warning that an effective date change must be entered with this transaction.
4. Select **OK** to proceed with making the change.
5. Update the disability status based on the documentation provided.
6. Click **SAVE** to complete the change.



You cannot edit an original disability status to “Yes – Persistent or Prolonged” if a student has applications prior to 2223. The

Persistent/Prolonged Disability must be added using an effective date on or after August 1, 2022.

Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

### **Citizenship**

Citizenship status is an “additional” profile field. It’s a mandatory field for both the full-time and part-time OSAP applications.

Documentation is required when the response is first added to the profile if the student selects their citizenship as:

- [Permanent Resident](#)
- [Protected Person](#)

However, a change request of any type will trigger a BPI documentation requirement.

### **Field Validations**

The field response is selected via radio buttons. The selection options are:

- Canadian Citizen
- Permanent Resident
- Protected Person
- Other
- Other – Status Indian



Protected Person can only be selected if the student’s SIN starts with a “9”.

### **Suppdoc 013: Permanent Resident Status**

A copy of the front and back of the student’s Permanent Resident Card is required.

If it is not available, the student must provide a copy of one of the following documents:

- Record of Landing (IMM 1000) or earlier document, such as a Canadian Immigration Information Card
- Confirmation of Permanent Residence
- Verification of Status

See section, [Process: Updating the Status of Category 1 Required Documents](#) for the steps when working with submitted documentation.

### **Comment: Supporting Document for Protected Person**

Supporting documentation for Protected Person status is triggered at the application level. It is not profile-specific because the eligibility of the Protected Person status is compared to the study period for the application.

### **Suppdoc 081: Citizenship Change (BPI)**

If student is now a Canadian citizen, a copy of one of the following is required:

- Front and back of their Canadian Citizenship Card
- Their Canadian Citizenship Certificate

### **Work with Citizenship Change Options**

There are two options to change the citizenship status:

- [Changing the original information](#) provided from the date the status was added to the profile (**EDIT**).
- Entering an [effective date](#) (point in time) change.



Changing citizenship status to “Other – Status Indian” can only be done as an effective date change and the student will be eligible for Federal funding only.

### ***Editing Citizenship Status as of Original Date***

Use **EDIT** to change the original citizenship value. Use this when an incorrect selection was chosen during entry.

1. From **Additional Information** select **Work with Citizenship**.
2. From **Work with Citizenship** select **EDIT**.
3. A pop-up window will present warning that the change could impact applications going back as far as 2013-14.
4. Select **OK** to proceed with making the change.
5. Update the citizenship status with the correct response.
6. Click **SAVE** to complete the change.

7. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

### ***Entering an Effective Date Citizenship Status Change***

1. From **Additional Information** select **Work with Citizenship**.
2. From **Work with Citizenship** select **ADD EFFECTIVE DATE CHANGE**.
3. Enter the effective date of the change using the drop-down lists.
4. Select the new **Value** of the student's citizenship.
5. Click **SAVE** to complete the change.
6. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

### ***Status with Children's Aid Society***

Status with Children's Aid is an "additional" profile field. It's a required field for the full-time OSAP application.

Documentation is required when it's first added to the profile if the student's response to both questions for this status are "Yes". However, a change request of any type will trigger a BPI documentation requirement.

### **Field Validations**

The field responses are selected via radio buttons. The selection options are:

- Yes
- No

A secondary question is presented only if the response to if they were in the permanent care of a Children's Aid Society or Child and Family Services Agency is "yes".

The secondary questions are a series of statements related to care and/or support provided to the student. The field response to this question is also selected via radio buttons with Yes and No response options.

In 2020-21, a new crown ward question was added to replace the previous Crown Ward Question #3 (Were you ever in the permanent care of Children's Aid Society anywhere in Canada).

In a scenario where:

- Crown Ward Question #1 (Were you ever in the permanent care of a Children's Aid Society or Child and Family Services Agency?) is **YES**; AND
- Crown Ward Question #2 (One of the following statements applies to me...) is **NO**

Starting August 1, 2020, the student profile Crown Ward Question #3 asks:

- Were you adopted in Ontario through a public adoption on or after August 1, 2013?

## Profile Field Requirements and Supporting Documents

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                           |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| <p>Were you ever in the permanent care of a Children's Aid Society or Child and Family Services Agency?<br/> <b>What is a Children's Aid Society or Child and Family Services Agency</b></p> <p>Students who were previously in the care of a Children's Aid Society or Child and Family Services Agency may be eligible for specific programs under OSAP.</p>                                                                                                                                                                                                                                                                                                                                                                                                                       | <p><input checked="" type="radio"/> Yes<br/> <input type="radio"/> No</p> |
| <p>One of the following statements applies to me:</p> <ul style="list-style-type: none"> <li>• I'm currently in extended society care in Ontario (previously called Crown ward);<br/> <b>What is Extended Society Care</b></li> <li>• I'm currently subject to a formal customary care agreement in Ontario;<br/> <b>What is Customary Care</b></li> <li>• I'm currently receiving an allowance or other transitional support from a Children's Aid Society or Child and Family Services Agency in Ontario;<br/> <b>What is an allowance or other transitional support</b></li> <li>• I was eligible to receive an allowance or other transitional support from a Children's Aid Society or Child and Family Services Agency in Ontario when I was 18 to 21 years of age.</li> </ul> | <p><input type="radio"/> Yes<br/> <input checked="" type="radio"/> No</p> |
| <p>Were you adopted in Ontario through a public adoption on or after August 1, 2013?<br/> <b>What is a public adoption</b></p> <p>Students who were adopted in Ontario through a public adoption on or after August 1, 2013 may be eligible for specific programs under OSAP.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <p><input type="radio"/> Yes<br/> <input type="radio"/> No</p>            |

Any student profile created prior to August 1, 2020, that met the above criteria, would have prompted the applicant to complete the new crown ward question prior to submitting a new 2020-21 OSAP application. In these older scenarios, the student profile details will display both the old and new crown ward responses.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |     |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| <p>Were you ever in the permanent care of a Children's Aid Society or Child and Family Services Agency?<br/> <b>What is a Children's Aid Society or Child and Family Services Agency</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Yes |
| <p>Students who were previously in the care of a Children's Aid Society or Child and Family Services Agency may be eligible for specific programs under OSAP.<br/>         One of the following statements applies to me:</p> <ul style="list-style-type: none"> <li>I'm currently in extended society care in Ontario (previously called Crown ward);<br/> <b>What is Extended Society Care</b></li> <li>I'm currently subject to a formal customary care agreement in Ontario;<br/> <b>What is Customary Care</b></li> <li>I'm currently receiving an allowance or other transitional support from a Children's Aid Society or Child and Family Services Agency in Ontario;<br/> <b>What is an allowance or other transitional support</b></li> <li>I was eligible to receive an allowance or other transitional support from a Children's Aid Society or Child and Family Services Agency in Ontario when I was 18 to 21 years of age.</li> </ul> | No  |
| <p>Were you ever in the permanent care of a Children's Aid Society or Child and Family Services Agency anywhere in Canada?<br/> <b>What is a public adoption</b></p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Yes |
| <p>Were you adopted in Ontario through a public adoption on or after August 1, 2013?<br/> <b>What is a public adoption</b></p> <p>Students who were adopted in Ontario through a public adoption on or after August 1, 2013 may be eligible for specific programs under OSAP.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | No  |



The response to the old Crown Ward question (Were you ever in the permanent care....?) did not impact the 2020-21 or future year applications.

### Suppdoc 082: Crown Ward Status

A completed Verification of Status with Ontario Children's Aid Society form is required.

If student has child welfare/child protection status from outside of Ontario, they must provide a letter from their appropriate Children's Aid Society or other equivalent agency confirming their status.

See section, [Process: Updating the Status of Category 1 Required Documents](#) for the steps when working with submitted documentation.

### Suppdoc 083: Crown Ward Status Change (BPI)

If request is to change both responses to "yes":

- A completed Verification of Status with Ontario Children's Aid Society form is required.
- If student has child welfare/child protection status from outside of Ontario, they must provide a letter from their home Children's Aid Society or other equivalent agency confirming their status.

If request is to either both responses or the secondary response to “no”:

- Written correspondence from the student indicating they made an error in the original response selected.

See section, [\*\*Process: Updating the Status of Category 2 Required Documents\*\*](#) for the steps when working with submitted documentation.

### **Francophone Status**

Francophone status is an “additional” profile field. It’s a required field for the full-time OSAP application.

No documentation is required when it’s first added to the profile. However, a change request will trigger a BPI documentation requirement.

### **Field Validations**

The field response is selected via radio buttons. The selection options are:

- Yes
- No

### **Suppdoc 084: Change to Francophone Status**

If request is to change status to “yes”:

- A letter from the student that includes the following:
  - A review requesting consideration for the Ontario Student Grant – Distance.
  - The date the student changed their course load in French during the current study period (if applicable).
  - Proof they are taking at least 60% of a full-time course load in French (or 40% if they have self-identified as having a permanent disability). Proof can include a letter from their program advisor.



A student with a Persistent or Prolonged Disability taking at least 40% and less than 60% of a full course load in French would only be eligible for federal assistance. As a result, they would not be eligible for OSG Distance – Commuting or OSG Distance – Travel.

If request is to change status to “no”:

- A letter from the student indicating they made an error in the original response selected.

## **Work with Francophone Status Change Options**

There are two options to change Francophone status:

- [Changing the original information](#) provided from the date the status was added to the profile (**EDIT**)
- Entering an [effective date](#) (point in time) change.

### ***Editing Francophone Status as of Original Date***

Use **EDIT** to change the original francophone status value. Use this when an incorrect selection was chosen during entry.

1. From **Additional Information** select **Work with Francophone**.
2. From **Work with Francophone** select **EDIT**.
3. A pop-up window will present warning that the change could impact applications going back as far as 2013-14.
4. Select **OK** to proceed with making the change.
5. Update the Francophone status with the correct response.
6. Click **SAVE** to complete the change.
7. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

### ***Entering an Effective Date Francophone Status Change***

1. From **Additional Information** select **Work with Francophone**.
2. From **Work with Francophone** select **ADD EFFECTIVE DATE CHANGE**.
3. Enter the effective date of the change using the drop-down lists.
4. Select the new **Value** of the francophone status.
5. Click **SAVE** to complete the change.
6. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

## **Indigenous Self-Identify Status**

Self-identification as Indigenous is an “additional” profile field. A response to this field is optional.

Documentation is required when it's first added to the profile if the student self-identifies as Indigenous. A change request of any type will also trigger a BPI documentation requirement.

### **Field Validations**

A response to this question is optional. Should the student choose to respond, the field response is selected via radio buttons. The selection options are:

- Yes
- No

Two additional questions are triggered if the student indicates they wish to self-identify as indigenous.

- Selection of description(s) that student self-identifies as.
- Authorization to sharing student's self-identification status with their school for the sole purpose of further financial support consideration.



If the student indicates they wish to self-identify as indigenous, a response to the 2 additional questions becomes mandatory.

### **Field Validations: Self-Identification Description**

The field response is selected via a checkbox. At least one response must be selected. More than one can be chosen. The selection options are:

- First Nation (Status/Non-Status)
- Métis
- Inuk (Inuit)
- Alternative term. If "Alternative term" is selected, a field to **Specify** the description is presented. The requirements are:
  - Description must be entered.
  - Response can be alpha and/or numeric
  - Minimum response: 2 characters
  - Maximum response: 40 characters

### **Field Validations: Approval to Share Self-Identification Status**

The field response is selected via radio buttons. The selection options are:

- Yes
- No

### **Suppdoc 085: Proof of Indigenous Status**

Student must provide a copy of one of the following. The student's:

- Status card (or Temporary Confirmation of Registration Document)
- Band membership card
- Red card (Haudenosaunee Identification Card).
- Confirmation of Band, Métis Nation of Ontario, or other Métis organization funding (Example: Post Secondary Student Support Program or Indigenous Skills Employment Training Program, Métis Nation Post-Secondary Education Strategy, and the Inuit Post-Secondary Education Strategy).
- Membership card from a provincial affiliate of the Congress of Aboriginal Peoples (Example: Ontario Coalition of Indigenous Peoples)
- Citizenship card issued by a Métis National Council governing member (Examples: Métis Nation of Ontario, Métis Nation of Saskatchewan)
- Land claim beneficiary card

If student is unable to provide any of those documents, one of the following is acceptable:

- A letter from an Indigenous organization (for example, Métis Nation of Ontario, Inuit Tapiriit Kanatami) on the organization's letterhead that includes student's name and confirmation of Indigenous identity. The letter should be signed and dated by a senior representative of the organization and should include their name, contact information, and position within the organization
- A letter from an Indigenous Friendship Centre, on the organization's letterhead that confirms their community involvement as well as the student's name and indigenous identity. The letter should be signed and dated by a senior representative of the organization and should include their name, contact information, and position within the organization
- An attestation from student confirming their Indigenous identity, including an explanation of why official documentation is unavailable. The attestation must include:
  - Student's name
  - Declaration of Indigenous identity
  - Description(s) of Indigenous persons in Canada that they self-identify as (Example: First Nation (Status/Non-Status), Métis, Inuk (Inuit), Alternative term to describe their Indigenous ancestry and/or identity (Example: Anishinaabe, Treaty 3)

 DNA test results will not be accepted as proof of Indigenous identity (for example, 23andMe, Ancestry DNA).

See section, [Process: Updating the Status of Category 1 Required Documents](#) for the steps when working with submitted documentation.

### Suppdoc 086: Indigenous Status Change (BPI)

If request is to change status to “yes”:

- Student must provide the same supporting documentation as outlined in [Suppdoc 085: Proof of Indigenous Status](#).

If request is to change status to “no”:

- A letter from the student indicating they made an error in their response.

### Work with Self-Identification Change Options

There are two options ways to change student’s self-identification status:

- [Changing the original information](#) provided from the date the status was added to the profile (**EDIT**).
- Entering an [effective date](#) (point in time) change.

### Editing Indigenous Self-Identification Status as of Original Date

Use **EDIT** to change the original indigenous self-identification status value. Use this when the student either did not provide an initial response or an incorrect selection was chosen during entry.

1. From **Additional Information** select **Work with Indigenous Self-Identify**.
2. From **Work with Indigenous Self-Identify** select **EDIT**.
3. A pop-up window will present warning that the change could impact applications going back as far as 2017-18.
4. Select **OK** to proceed with making the change.
5. Update the Indigenous self-identification with the correct response.

If response is being changed to “Yes”:

- Select the description(s) applicable to student.
  - Select the response corresponding to whether the student has provided authorization to share their Indigenous status.
6. Click **SAVE** to complete the change(s).

7. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

### **Entering an Effective Date Indigenous Self-Identification Status Change**

 A change to Indigenous Self-Identification status will impact full-time applications with a study start date on or after the effective date associated with the change.

1. From **Additional Information** select **Work with Indigenous Self-Identify**.
2. From **Work with Indigenous Self-Identify** select **ADD EFFECTIVE DATE CHANGE**.
3. Enter the effective date using the following format: DDMMYYYY. Alternatively, choose the date using the interactive onscreen calendar.
4. Update the Indigenous self-identification with the correct response.  
If response is being changed to “Yes”:
  - Select the description(s) applicable to student.
  - Select the response corresponding to whether the student has provided authorization to share their Indigenous status.
5. Click **SAVE** to complete the change(s).
6. Proceed to [Step 2: Update Required Document Status](#). Updating the field is the first of three steps when updating Category 2 required documents.

### **Permanent Canadian Address Fields**

All permanent Canadian address fields are part of the basic profile.

Changes to these fields are done as follows:

1. Click **EDIT** located within **Permanent Canadian Address** sub-section.
2. Update the information as required
3. Click **SUBMIT** to trigger field validations and save the updates.

If the required permanent Canadian address fields are not provided, the profile is incomplete.

### **Street Name & Number**

A response to **Street Name & Number** must be provided.

A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.

French characters (e.g., É, é, ç) not allowed.

### **Apartment**

**Apartment** is an optional response field.

A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.

French characters (e.g., É, é, ç) not allowed.

### **City, town, or post-office**

A response to **City, town or post-office** must be provided.

A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.

French characters (e.g., É, é, ç) not allowed.

### **Province**

A response to **Province** must be provided.

The response is selected using a dropdown list:

- Any province or territory selected is a valid response
- An error will generate if “Other” is selected.

### ***Background: Why “Other” is Listed under Permanent Canadian Address***

“Other” is presented as a field response option to enter (invalid) information provided by the student on their paper funding application

To save the information provided and continue with the application entry flow, click **SUBMIT INCOMPLETE**.

***Permanent Canadian Address*** will be marked as incomplete in ***Student Profile Details***.

| Permanent Canadian Address ▼                                                                            |               | Incomplete                                                                                                  |
|---------------------------------------------------------------------------------------------------------|---------------|-------------------------------------------------------------------------------------------------------------|
| Street name and number, rural route, or post office box:                                                | 189 Red River | <br><br><b>EDIT &gt;</b> |
| Apartment:                                                                                              | 4th           |                                                                                                             |
| City, town, or post office:                                                                             | Thunder Bay   |                                                                                                             |
| Province:                                                                                               | Other         |                                                                                                             |
| Region code:                                                                                            | zz            |                                                                                                             |
| Postal code:<br>Enter without space or dash (e.g., P0T2E0)                                              | P7B6G9        |                                                                                                             |
| Telephone number:<br>Enter all 10-digits including the area code and telephone number (e.g. 4165551212) | 807-123-4567  |                                                                                                             |

### Postal Code

A response to **Postal code** must be provided.

It must be provided in the valid Canadian postal code format (A1A2B2). Do not include spaces in the response.

If Ontario is selected as province, error will be generated if postal code listed is not a valid Ontario code.

### Telephone Number

A response to **Telephone number** must be provided.

A 10-digit numeric entry is required. The first digit cannot be 0 (zero). Do not include spaces or dashes in the response.

### Mailing Address

All mailing address fields are part of the basic profile.

The mailing address can be anywhere in the world. Any paper correspondence generated for the student is sent to this address.

Changes to these fields are done as follows:

4. Click **EDIT** located within **Mailing Address** sub-section.
5. If question **Mailing Address the same as Permanent Address** = Yes, then response will have to be changed to “no” to edit mailing address fields.
6. Update the information as required.
7. Click **SUBMIT** to trigger field validations and save the updates.

### Mailing Address same as Permanent Canadian Address?

A response to **Mailing Address same as Permanent Canadian Address** must be provided.

The field response is selected via radio buttons. The selection options are:

- Yes
- No



If “Yes” selected, the fields in **Mailing Address** will be pre-filled with the responses in **Permanent Canadian Address**.

### Street Name & Number

Mailing address has two entry fields for **Street Name & Number**:

- A response in the first field row is mandatory
- A response in the second field row is optional.

A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.

French characters (e.g., É, é, ç) not allowed.

### Apartment

**Apartment** is an optional response field.

A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.

French characters (e.g., É, é, ç) not allowed.

### City, town, or post-office

A response to **City, town or post-office** must be provided.

A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.

French characters (e.g., É, é, ç) not allowed.

### Province or State

A response to **Province or State** must be provided.

The response is selected using a dropdown list that includes

- All Canadian provinces and territories
- All U.S. states
- “Other”



Selecting the “Not on list” checkbox will default the dropdown response to “Other”.

### Region Code

This field is presented only when “Other” is selected in **Province or State**.

A response to a maximum of two characters is required. The response can be letters and/or numbers.

A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.

### Postal or Zip Code

A response to **Postal or Zip Code** must be provided.

The field validations for this field depend on the response entered in **Province or State**:

- If a Canadian province or territory is selected:
  - Entry must be in valid Canadian postal code format (A1A2B2), with no spaces in the response.
  - If Ontario is selected as province, an error will be generated if postal code is not a valid Ontario code.
- If a U.S. state is selected in selected:
  - The response must be a 5-character numeric response.
  - Do not include any spaces in the response.
- If “**Other**” is selected:
  - The response cannot exceed six characters.
  - The response can be letters and/or numbers.
  - A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.
  - XXXXXX is a valid response. This is the instructions provided to the student if no postal or zip code exists for the country.

### Country

The action required for this field depends on the response entered in **Province or State**:

- If a Canadian province or territory is selected, **Country** will prefill to “Canada”.
- If a U.S. state is selected, **Country** will prefill to “U.S.A”

- If “**Other**” is selected, a response must be provided:
  - The response can be letters and/or numbers.
  - A period, comma, hyphen, or apostrophe is acceptable. No other symbols (e.g., #, &, @) are allowed.

### Telephone Number

A response to **Telephone number** must be provided.

A 10-digit numeric entry is required. The first digit cannot be 0 (zero). Do not include spaces or dashes in the response.

### Email Address



Only the student can add, edit, or delete their email address. They make the changes by logging into their OSAP account.

For reference, these are the email field edits to assist you in answering any questions a student may have. The email:

- Must be in valid email format (<text>@<text>.<text>).
- Cannot match an email address listed in any other student profile.
- Must be provided if student chooses one or both of the following:
  - **Check application status** = online
  - **Get personalized form** = student will print

### Email Validation Status

A validated email is a pre-requisite for using the self-serve email method for password reset and/or OAN retrieval.

Only [the student can validate their email address](#). They do this by either:

Using the code generated when they logged into their OSAP account.

Using the code that you triggered from their profile.

### Email Validation Status Options

The validation status is specific to the email currently listed on the profile.

The possible **Email validation status** entries are:

- Validated
- Validation Required

- Not Applicable. This appears when there is no email in the profile.



You cannot edit the response in **Email validation status**. The response changes based on the action taken by the student.

If student edits their email address, the existing validation status is reset, and the new email address must be validated.

### Action: Request Email Validation

You can trigger an email validation code for the student using the **Request Email Validation** link. The link appears only when the **Email validation status** = Validation Required.

| Email Address and Correspondence Options ▾                      |                                    | Complete                                                     |
|-----------------------------------------------------------------|------------------------------------|--------------------------------------------------------------|
| Email address:                                                  | <input type="text"/>               | <b>REQUEST EMAIL<br/>VALIDATION &gt;</b><br><b>EDIT &gt;</b> |
| Why we ask for your email address                               |                                    |                                                              |
| Email validation status                                         | Validation Required                |                                                              |
| How to check the status of all your applications:               | You will check your status online  |                                                              |
| In which language do you want your information?                 | English                            |                                                              |
| How to get all your personalized forms (e.g., signature pages): | You will print your forms yourself |                                                              |

The code is sent directly to the email address on the student's profile.

A confirmation message will appear at the top of screen confirming the validation code has been sent. You will not see the code sent.

### Background: Automatic Generation of Email Validation Code

If **Email Validation status** on the student's profile = Validation Required, an email validation code is triggered when they log into their OSAP account.

The validation code is sent by the OSAP Webmaster. The code is 12-characters long and is case-sensitive.

The above process repeats itself each time the student logs into their account unless a valid code is outstanding.

### Background: How Students Validate their Email Address

The student has two options to validate their email address:

- By entering their code on the OSAP Applications page:

### Applications

**Email validation code**

[How to get your code and why it's important](#)

Enter your email validation code:  Validate

**Full-time application**

Use this application if you're taking 60% or more of a full

**Part-time application**

Use this application if you're taking 20% to 59% of a full course

- By clicking on the link included in the validation code email.

In order to validate your email address click on the link below and your email address will be automatically validated:

[https://](#)

You can also log into the [OSAP website \(ontario.ca/osap\)](#) and enter the following 12-digit code:

4stf

The link and code expires in 24 hours so don't delay.

If your email address is validated we send you emails about the status of your OSAP application. It's also used to reset your password or OAN if you forget them.

Ministry of Colleges and Universities  
Student Financial Assistance Branch

### Email Validation Code Expiry and Audit Details

The validation code expires when one of the conditions is met:

- In 24 hours from the code being generated, or
- Once the email address is successfully validated, or
- When a new code is triggered using [Request Email Validation](#).

The expiry information for the code is listed in **Student Profile Audit**.

| Student Profile Audit  |                            |                                           |                                           |                           |
|------------------------|----------------------------|-------------------------------------------|-------------------------------------------|---------------------------|
| Date and Time: ▼       | Field Name: ⚙              | Before Value:                             | After Value:                              | User:                     |
| Nov 23/2022<br>3:11 PM | E-mail validation flag     | Validation required                       | Validated                                 | Student                   |
| Nov 23/2022<br>3:10 PM | E-mail validation code     |                                           | Expiry Nov 24, 2022<br>03:10:42:PM        | User Guide<br>Demo (EUAL) |
| Nov 23/2022<br>3:09 PM | E-mail validation code     |                                           | Expiry Nov 24, 2022<br>03:09:22:PM        | Student                   |
| Nov 23/2022<br>3:09 PM | Language of correspondence | French                                    | English                                   | Student                   |
| Nov 23/2022<br>3:09 PM | E-Mail Address             | <input style="width: 80px;" type="text"/> | <input style="width: 80px;" type="text"/> | Student                   |

### Language Preference

**Language preference** is a mandatory profile field. All ministry-generated communication is sent in the language selected.



Information presented to the student in their online account is always available in both English and French. The presentation is determined using a language toggle on each web page.

### **Field Validations**

The field response is selected via radio buttons. The selection options are:

- English
- French

### **Method to Check Application Status**

The method to check the status of all applications is defaulted to email however, the student can choose to receive paper notification by selecting a checkbox.

If the student chooses to check the status of their applications online, an email address is mandatory:

- A generic email message advises the student to log into their OSAP account and check their Message Centre for details each time their account status has changed.

If the student chooses to have the ministry mail the information:

- Application updates are sent by the ministry in paper format. The student can log into their online account to check their account status even if the ministry-mail option is selected.

### **Field Validations**

If the student has not selected the paper communication checkboxes, an error message will generate if there is no email address on the student's profile.

### **Method to Get Personalized Forms**

The method to obtain personalized forms is also defaulted to printing forms from the student's online account. Personalized forms include the Disability Verification form, Credit Check Review form and signature pages. The student can select a checkbox if they wish to have OSAP mail their forms instead.

 Regardless of the option selected, the student can print their personalized forms from their OSAP account if the supporting document's status is not "Approved".

### Field Validations

The field response is selected via checkboxes. The selection options are:

- I want OSAP to mail this information instead (how to check the status of all your applications)
- I want OSAP to mail my forms instead (how to get personalized forms)

If the student has not selected the paper communication checkboxes, an error message will generate if there is no email address on the student's profile.

### Access to OSAP Information (FOI Authorization)

**Access to your OSAP Information** is a mandatory profile field.

No documentation is required if the student adds or updates these authorization fields from their online account.

However, you must have written confirmation from the student before you add or edit any of these authorization fields. See section, [Confirmation of Student's Signature for Consent](#) for a list of acceptable forms of written confirmation.

### Background: What does giving Access to their OSAP Information Mean?

This question allows the student to identify one or more person(s) who can access details about their OSAP applications. This is also referred to as a release of information or FOI (freedom of information) authorization.

The authorization is valid for a five-year period from the day it is entered on the student's profile.

The student can withdraw the authorization on a per person basis at any time. Any such changes are reflected in the [Student Profile Audit](#).

 Before releasing information to anyone other than the student, you must verify that the individual has authorized access to it. Refer to section [Pre-Requisites Before Releasing Information to Anyone Other than the Student](#) for details.

### What is Excluded from the Access to OSAP Information Authorization?

Having valid access to information does **not** extend to any of the following:

- Password reset and/or OAN retrieval.
- Completing any OSAP forms on behalf of the student.
- Requesting reviews or other changes to the student's account.

Providing parental or spousal information needed for a funding application does **not** mean those individuals have access to the student's account information. The only way access is granted is if the student completes the Access to OSAP Information details.

### Field Validations

#### Wish to give access to OSAP Information?

The field response is selected via radio buttons. The selection options are:

- Yes
- No

A "Yes" response triggers the fields needed to record the details for each person the student is authorizing access:

- First Name
- Last Name
- Date of Birth

| Access to your OSAP Information                                                                                                                                               |                      |                            |                          |                                                                  | Clear Section >    |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|----------------------------|--------------------------|------------------------------------------------------------------|--------------------|
| Do you want to give access to your OSAP information to a family member, friend or someone close to you?<br><small>Understand what type of information they can access</small> |                      |                            |                          | <input checked="" type="radio"/> Yes<br><input type="radio"/> No |                    |
| First Name:                                                                                                                                                                   | Last Name:           | Date of Birth:             |                          | Valid Until:                                                     | Action:            |
| <input type="text"/>                                                                                                                                                          | <input type="text"/> | Month <input type="text"/> | Day <input type="text"/> | Year <input type="text"/>                                        | <b>Remove &gt;</b> |
|                                                                                                                                                                               |                      |                            |                          |                                                                  | <b>ADD &gt;</b>    |
| <input type="checkbox"/> I confirm the student has provided his/her signature giving consent to the release of personal information relating to their OSAP file.              |                      |                            |                          |                                                                  |                    |

To add another row to enter an individual's details, click **ADD**.

To delete access to an authorized individual, click **Remove** corresponding to the row of details in question.

#### (Authorized Person's) First name & Last name

First and last name of the authorized individual are both mandatory fields.

The response cannot include numbers.

A period, comma, hyphen, or apostrophe is okay. No other symbols (e.g., #, &, @) are allowed.

French characters (e.g., É, é, ç) will not reject. However, they will convert to the English keyboard (e.g., E, e, c) upon submit.

### (Authorized Person's) Date of Birth

Date of birth of the authorized individual is a mandatory field.

The month, day and year fields must be specified.

The date entered must be a valid date. It cannot be future-dated.

### Valid Until Date

Each authorization is valid for a period of up to 5 years from the time it is added or updated in the student's profile. This is displayed in the **Valid Until** date.

| Access to your OSAP Information ▾                                                                                                                              |                      |                |              | Complete |              |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|----------------|--------------|----------|--------------|
| Do you want to give access to your OSAP information to a family member, friend or someone close to you?<br>Understand what type of information they can access |                      | Yes            | EDIT >       |          |              |
| Last Name:                                                                                                                                                     | First Name:          | Date of Birth: |              |          | Valid Until: |
| <input type="text"/>                                                                                                                                           | <input type="text"/> | Feb 04, 1990   |              |          | Feb 26, 2026 |
|                                                                                                                                                                |                      | Aug 02, 2002   | Nov 24, 2027 |          |              |

Once the **Valid Until** date has passed, the authorization has expired. The date will be presented in red text to highlight the expiration.

| Access to your OSAP Information ▾                                                                                                                              |                      |                |              | Complete |              |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|----------------|--------------|----------|--------------|
| Do you want to give access to your OSAP information to a family member, friend or someone close to you?<br>Understand what type of information they can access |                      | Yes            | EDIT >       |          |              |
| Last Name:                                                                                                                                                     | First Name:          | Date of Birth: |              |          | Valid Until: |
| <input type="text"/>                                                                                                                                           | <input type="text"/> | Feb 19, 1959   |              |          | Jan 31, 2021 |
|                                                                                                                                                                |                      | Jan 25, 1998   | Apr 06, 2023 |          |              |

### Confirmation of Student's Signature for Consent

The student's written consent, including their signature, is required to add or update authorization access.

The following are ways the student can provide written consent for purposes of adding or editing access information:

- The completed **Access to your OSAP Information** section in an OSAP funding application.
- A completed **OSAP Release of Information to Others** form.

## Profile Field Requirements and Supporting Documents

- A signed and dated letter from the student.



Do not make changes based on either verbal instructions or instructions within an email.

### Field Validation: Confirmation of Student's Signature

Click on the checkbox to confirm you have the student's written consent – which includes their signature - to make any changes on **Access to your OSAP Information**.

| Access to your OSAP Information                                                                                                                                       |                      |                      |  |                                                                  | Clear Section > |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|----------------------|--|------------------------------------------------------------------|-----------------|
| Do you want to give access to your OSAP information to a family member, friend or someone close to you?<br><b>Understand what type of information they can access</b> |                      |                      |  | <input checked="" type="radio"/> Yes<br><input type="radio"/> No |                 |
| First Name:                                                                                                                                                           | Last Name:           | Date of Birth:       |  | Valid Until:                                                     | Action:         |
| <input type="text"/>                                                                                                                                                  | <input type="text"/> | Month ▼ Day ▼ Year ▼ |  | <input type="text"/>                                             | Remove >        |
|                                                                                                                                                                       |                      |                      |  |                                                                  | ADD >           |
| <input type="checkbox"/> I confirm the student has provided his/her signature giving consent to the release of personal information relating to their OSAP file.      |                      |                      |  |                                                                  |                 |

### Pre-Requisite Before Releasing Information to Anyone Other than the Student

Check the profile and verify the authorization is still valid before releasing information to anyone other than the student.

The individual must provide you with the following information:

- Their first and last name
- Their date of birth
- The student's first and last name
- The student's Social Insurance Number

All responses must be an exact match to the information on the student's profile.

Also, check the **Valid Until** date to ensure the authorization is still valid.

| Access to your OSAP Information ▼                                                                                                                                     |                      |                |              | Complete |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|----------------|--------------|----------|
| Do you want to give access to your OSAP information to a family member, friend or someone close to you?<br><b>Understand what type of information they can access</b> |                      | Yes            |              | EDIT >   |
| Last Name:                                                                                                                                                            | First Name:          | Date of Birth: | Valid Until: |          |
| <input type="text"/>                                                                                                                                                  | <input type="text"/> | Apr 01, 1999   | Jan 24, 2025 |          |

Contact the ministry if you have any questions about releasing information to someone other than the student.

### Student Linking to [ontariocolleges.ca](http://ontariocolleges.ca) and OUAC

## Profile Field Requirements and Supporting Documents

An OSAP application is pre-filled with school and program information from their ontariocolleges.ca and/or OUAC application if the student chooses the [linking option in the OSAP new user registration](#).

This is an optional service for the student. Only the student can opt in or out of the linking at any point by updating the information in their OSAP account.

### Field Validations

This is an information field only. You cannot edit the student's response.

A separate field response is listed specific for ontariocolleges.ca and OUAC online applications.

| Student Linking to OCAS and OUAC ▼                                                                                  |               | Complete |
|---------------------------------------------------------------------------------------------------------------------|---------------|----------|
| Student has active link to Ontario College Application Service (OCAS)?<br>How linking impacts your OSAP application | Not Specified |          |
| Student has active link to Ontario Universities' Application Centre (OUAC)?<br>How linking to OUAC works            | Yes           |          |

The response options presented are:

- Yes (student has linked their account)
- Not specified (student has not linked their account)
- No (link removed)

Any changes made by the student to this field are included in the **Profile Audit**.

|                         |           |        |              |         |
|-------------------------|-----------|--------|--------------|---------|
| Jul 12/2022<br>11:45 AM | OUAC Link | Linked | Link removed | Student |
|-------------------------|-----------|--------|--------------|---------|

## Working with Profile Documentation

### What Triggers Profile Documentation

Profile supporting documents (or “suppdocs”) are triggered for one of the following reasons:

- To verify initial profile information provided is accurate/correct. These are referred to as “[Category 1](#)” supporting documents.
- To confirm a change requested by the student. This are referred to as “[Category 2](#)” or “BPI change” supporting documents.

### List of Category 1 Profile Documents

- 013: Proof of Citizenship
- 027: Proof of Birth Date
- 043: Proof of Persistent/Prolonged Disability
- 048: Proof of Permanent Disability
- 082: Proof of Status with Children’s Aid Society
- 085: Proof of Indigenous Status
- 087: Proof of Status with Children’s Aid Society (Adoption)

### List of Category 2 Profile Documents

- 028: Name change
- 029: Birth Date change
- 030: Gender change
- 031: Disability Status change
- 032: High School Date change
- 081: Citizenship Status change
- 083: CAS Status change
- 084: Francophone Status change
- 086: Indigenous Status change

### Impact of Outstanding Category 1 and 2 Documents

An outstanding profile supporting document can impact any funding application that uses the corresponding profile field.

For Category 2 documents especially, the timing of the change request factors into whether the outstanding document impacts the current application or applies to any future application submitted.

If there is an impact, the outstanding document is added to the list of the student's required documents in their account.

| Supporting Documentation |                                                       |                    |          |                                   |
|--------------------------|-------------------------------------------------------|--------------------|----------|-----------------------------------|
| Required Documentation ▼ |                                                       |                    |          |                                   |
| Code:                    | Description:                                          | Severity:          | Status:  | Action:                           |
|                          | Master Student Financial Assistance Agreement (MSFAA) | Funding            | Required | <a href="#">VIEW DETAILS &gt;</a> |
| 013                      | Student Profile - Proof of Citizenship Status         | Funding            | Required |                                   |
| 039                      | Your Declaration and Signature Pages                  | Funding            | Required |                                   |
| 048                      | Student Profile - Proof of Disability                 | Additional Funding | Required |                                   |
| 085                      | Student Profile - Proof of Indigenous Status          | Additional Funding | Required |                                   |

### Profile Documentation: Screen Layout

**Profile Documentation** is like supporting documentation screens in other administrative portals.

The screen is broken into two sub-sections:

- **Required documents**
- **Approved documents** (if applicable)

|                          |                                                       |                           |                                 |
|--------------------------|-------------------------------------------------------|---------------------------|---------------------------------|
|                          |                                                       | <a href="#">EDIT &gt;</a> | <a href="#">VIEW AUDIT &gt;</a> |
| Profile Documentation    |                                                       |                           |                                 |
| Required Documentation ▼ |                                                       |                           |                                 |
| Code                     | Description                                           | Status                    |                                 |
| 043                      | Proof of Persistent/Prolonged Disability - 01/08/2022 | <a href="#">Required</a>  |                                 |
| 085                      | Proof of Indigenous Status                            | <a href="#">Required</a>  |                                 |
| Approved Documentation ▼ |                                                       |                           |                                 |
| Code                     | Description                                           | Status                    |                                 |
| 013                      | Proof of Citizenship Status - 05/10/2017              | Approved                  |                                 |
| 013                      | Proof of Citizenship Status                           | Approved                  |                                 |
| 048                      | Proof of Disability                                   | Approved                  |                                 |

Each document row includes:

- The identifying **Code** for the supporting document.
- A high-level **Description** of the document
- The document's current **Status**, which can be one of the following:
  - Required
  - Approved
  - Denied
  - Waived (in limited situations)

The identifying **Code** is **not** communicated to the student. Use it for reference (if needed) when communicating with the ministry.

The **Description** for a Category 2 required document will include the date when the student requested the change from their online account.

| Profile Documentation    |                                                       |          |
|--------------------------|-------------------------------------------------------|----------|
| Required Documentation ▾ |                                                       |          |
| Code                     | Description                                           | Status   |
| 028                      | Proof of Name - 05/03/2021                            | Denied   |
| 029                      | Proof of Date of Birth - 05/03/2021                   | Denied   |
| 031                      | Proof of Disability - 05/03/2021                      | Denied   |
| 043                      | Proof of Persistent/Prolonged Disability - 01/08/2022 | Required |
| 048                      | Proof of Disability                                   | Denied   |
| 083                      | Proof of Crown Ward - 05/03/2021                      | Denied   |
| 086                      | Proof of Indigenous Status - 05/03/2021               | Required |

### Presentation: Category 2 Change Request in Student Profile Details

The student cannot change existing basic personal identification (BPI) fields from their online account. Instead, they flag where a change is required. This generates the Category 2 required document.

The field in **Student Profile Details** is labelled with **\*Change Requested** to clearly identify the outstanding change request.

|                |  |                   |
|----------------|--|-------------------|
| First name:    |  |                   |
| Last name:     |  | *Change Requested |
| Date of birth: |  |                   |
| Gender:        |  |                   |

### Steps to the Required Document Update Process

Working with supporting documents is a multi-step process that can include updating:

- Profile field content.
- Required document status.
- The document's status in the Image Administrative Portal work queue.

The process is slightly different for Category 1 versus Category 2 supporting documents, as outlined in the following:

- [Updating Status of Category 1 Required Documents](#)
- [Updating Status of Category 2 Required Documents](#)

### Process: Updating the Status of Category 1 Required Documents

## Step 1: Review Supporting Documents

There are two components to this document review:

- Did the document provided have acceptable proof? Refer to [Profile Fields Requirements and Supporting Documents](#) as needed for documentation requirements.
- Does the information contained in the documentation support the information in the corresponding profile field?

The action taken depends on the outcome of your review:

### **Action: Documentation is Acceptable and Supports the Profile Information**

Go to [Step 2: Update Required Document Status](#). You will be changing the document status to **Approved**.

### **Action: Documentation is Not Acceptable**

Go to [Step 2: Update Required Document Status](#). You will be changing the document's status to **Denied**.

### **Action: Student Provided the Wrong Information in their Profile**

Edit the profile information to reflect the correct information. In the case of **Citizenship** or **Indigenous Self-Identification** status, the edit is as of the **Original Date**.

Next, submit the application for processing. Based on the change made, the supporting document is likely no longer required. In that instance, the system will:

- Remove the documentation requirement from the profile.
- Display the **After Value** in **Supporting Document Audit**.as Inactive.

| Date and Time:          | Supporting Document:  | Before Value: | After Value:                                                                                  | User:                     |
|-------------------------|----------------------------------------------------------------------------------------------------------|---------------|-----------------------------------------------------------------------------------------------|---------------------------|
| Nov 25/2022<br>11:42 AM | 048 - Proof of Disability<br>Original                                                                    | Active        | Inactive  | User Guide Demo<br>(EUAL) |

Go to [Step 3: Update Image Portal Work Queue](#) to complete the image work queue.

## Step 2: Update Required Document Status

1. From **Profile Documentation**, click on **EDIT**.

|                          |                             |          | EDIT > | VIEW AUDIT > |
|--------------------------|-----------------------------|----------|--------|--------------|
| Profile Documentation    |                             |          |        |              |
| Required Documentation ▾ |                             |          |        |              |
| Code                     | Description                 | Status   |        |              |
| 013                      | Proof of Citizenship Status | Required |        |              |
| 048                      | Proof of Disability         | Required |        |              |

- Use the dropdown list to update the **Status** for the applicable document.
  - Approved** = documentation provided was acceptable and verifying the profile information.
  - Denied** = documentation provided was not acceptable and/or did not support the information entered in the profile field.

| Profile Documentation    |                             |                                             |
|--------------------------|-----------------------------|---------------------------------------------|
| Required Documentation ▾ |                             |                                             |
| Code                     | Description                 | Status                                      |
| 013                      | Proof of Citizenship Status | <div>Approved<br/>Denied<br/>Required</div> |
| 048                      | Proof of Disability         |                                             |
| Approved Documentation > |                             |                                             |



Category 1 supporting documents cannot be waived.

In **Profile Documentation**, **Waived** is not presented as a status option for Category 1 documents.

From the student's application account **Waived** is listed as an option. However, an error message will be generated if **Waived** is selected for a Category 1 document.

| Required Documentation ▾ |                                               |           |                                                    |         |
|--------------------------|-----------------------------------------------|-----------|----------------------------------------------------|---------|
| Code:                    | Description:                                  | Severity: | Status:                                            | Action: |
| 039                      | Your Declaration and Signature Pages          | Funding   | Required ▾                                         |         |
| 013                      | Student Profile - Proof of Citizenship Status | Funding   | Waived ▾<br>Error: This document cannot be waived. |         |

- Once you are done updating, click **SAVE**.
- Approved documents will shift into the **Approved Application Documentation** section within of **Profile Documentation**.  
  
Denied documents will remain within the **Required Documentation** sub-section.



Students who identify as having a PPD will be required to provide supporting documentation to verify their disability status. Once the student has satisfied the original proof of PPD supdoc requirement

(043), additional documentation is not required for the remainder of that academic year; however, in subsequent academic years they will be required to provide an attestation to remain eligible for disability-related supports. As a result, the supdoc approval must be completed from within an application to ensure the relevant academic year is associated with the approval.

Student Profile will reflect the document and its current status, but the status dropdown is not displayed on the Edit page.

| Profile Documentation    |                                          |                                                                                                                                                                    |
|--------------------------|------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Student Information      |                                          | Action:                                                                                                                                                            |
| Name:                    | <input type="text"/>                     |                                                                                                                                                                    |
| SIN:                     | <input type="text"/>                     |                                                                                                                                                                    |
| OAN:                     | <input type="text"/>                     |                                                                                                                                                                    |
| OEN:                     | <input type="text"/>                     |                                                                                                                                                                    |
|                          |                                          | <a href="#" style="color: red; text-decoration: none;">EDIT &gt;</a> <a href="#" style="color: red; text-decoration: none; margin-left: 10px;">VIEW AUDIT &gt;</a> |
| Profile Documentation    |                                          |                                                                                                                                                                    |
| Required Documentation ▼ |                                          |                                                                                                                                                                    |
| Code                     | Description                              | Status                                                                                                                                                             |
| 043                      | Proof of Persistent/Prolonged Disability | <a href="#" style="color: blue;">Required</a>                                                                                                                      |

| Student Inquiry                                                                                                                                                |                      |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| Student Information                                                                                                                                            |                      |
| Name:                                                                                                                                                          | <input type="text"/> |
| SIN:                                                                                                                                                           | <input type="text"/> |
| OAN:                                                                                                                                                           | <input type="text"/> |
| OEN:                                                                                                                                                           | <input type="text"/> |
| Required Documentation ▼                                                                                                                                       |                      |
| No supporting documents found.                                                                                                                                 |                      |
| <a href="#" style="color: red; text-decoration: none;">CANCEL &gt;</a> <a href="#" style="color: red; text-decoration: none; margin-left: 10px;">SAVE &gt;</a> |                      |

To edit the supdoc status, users must use the Edit function available through the application:

| Supporting Documentation - 2022-2023                      |                                                            |                                                                                                                                              |          |         |
|-----------------------------------------------------------|------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|----------|---------|
| Student SIN:                                              | <input type="text"/>                                       | Student No:                                                                                                                                  | Action:  |         |
| Name (Last, First):                                       | <input type="text"/>                                       | <a href="#">VIEW STUDENT PROFILE &gt;</a><br><a href="#">VIEW STUDENT SUMMARY &gt;</a><br><a href="#">VIEW ALL CORE-FT APPLICATIONS &gt;</a> |          |         |
| Account Number:                                           | <input type="text"/>                                       |                                                                                                                                              |          |         |
| Master status:                                            | Open                                                       |                                                                                                                                              |          |         |
| Processing status:                                        | Funding - Confirmation of Enrolment                        |                                                                                                                                              |          |         |
| Institution:                                              | EUAL - LAKEHEAD UNIVERSITY                                 |                                                                                                                                              |          |         |
| Study Period(s):                                          | August 22, 2022 - April 25, 2023 (35 weeks)                |                                                                                                                                              |          |         |
| Student Status:                                           | Single Independent                                         |                                                                                                                                              |          |         |
| <a href="#">EDIT &gt;</a> <a href="#">VIEW AUDIT &gt;</a> |                                                            |                                                                                                                                              |          |         |
| Supporting Documentation                                  |                                                            |                                                                                                                                              |          |         |
| Required Documentation ▾                                  |                                                            |                                                                                                                                              |          |         |
| Code:                                                     | Description:                                               | Severity:                                                                                                                                    | Status:  | Action: |
| 043                                                       | Student Profile - Proof of Persistent/Prolonged Disability | Additional Funding                                                                                                                           | Required |         |
| Approved Application Documentation >                      |                                                            |                                                                                                                                              |          |         |

| Supporting Documentation - 2022-2023 |                                                            |                                                                                                                                              |                           |         |
|--------------------------------------|------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------|
| Student SIN:                         | <input type="text"/>                                       | Student No:                                                                                                                                  | Action:                   |         |
| Name (Last, First):                  | <input type="text"/>                                       | <a href="#">VIEW STUDENT PROFILE &gt;</a><br><a href="#">VIEW STUDENT SUMMARY &gt;</a><br><a href="#">VIEW ALL CORE-FT APPLICATIONS &gt;</a> |                           |         |
| Account Number:                      | <input type="text"/>                                       |                                                                                                                                              |                           |         |
| Master status:                       | Open                                                       |                                                                                                                                              |                           |         |
| Processing status:                   | Funding - Confirmation of Enrolment                        |                                                                                                                                              |                           |         |
| Institution:                         | EUAL - LAKEHEAD UNIVERSITY                                 |                                                                                                                                              |                           |         |
| Study Period(s):                     | August 22, 2022 - April 25, 2023 (35 weeks)                |                                                                                                                                              |                           |         |
| Student Status:                      | Single Independent                                         |                                                                                                                                              |                           |         |
|                                      |                                                            |                                                                                                                                              |                           |         |
| Supporting Documentation             |                                                            |                                                                                                                                              |                           |         |
| Required Documentation ▾             |                                                            |                                                                                                                                              |                           |         |
| Code:                                | Description:                                               | Severity:                                                                                                                                    | Status:                   | Action: |
| 043                                  | Student Profile - Proof of Persistent/Prolonged Disability | Additional Funding                                                                                                                           | Required ▾                |         |
| Approved Application Documentation ▾ |                                                            |                                                                                                                                              |                           |         |
| Code:                                | Description:                                               | Severity:                                                                                                                                    | Status:                   | Action: |
|                                      | Master Student Financial Assistance Agreement (MSFAA)      | Funding                                                                                                                                      | Approved                  |         |
| 039                                  | Your Declaration and Signature Pages                       | Funding                                                                                                                                      | Approved ▾                |         |
| <a href="#">CANCEL &gt;</a>          |                                                            |                                                                                                                                              | <a href="#">SAVE &gt;</a> |         |

After the supdoc status has been updated to “Approved”, the document will display an additional chevron that can be selected to reveal the academic year it was approved. This will display in both the application and profile documentation sections.

| Supporting Documentation - 2022-2023 |                                                                   |                                                                                                                                              |                           |                                   |
|--------------------------------------|-------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|-----------------------------------|
| Student SIN:                         |                                                                   | Student No:                                                                                                                                  | Action:                   |                                   |
| Name (Last, First):                  |                                                                   | <a href="#">VIEW STUDENT PROFILE &gt;</a><br><a href="#">VIEW STUDENT SUMMARY &gt;</a><br><a href="#">VIEW ALL CORE-FT APPLICATIONS &gt;</a> |                           |                                   |
| Account Number:                      |                                                                   |                                                                                                                                              |                           |                                   |
| Master status:                       | Open                                                              |                                                                                                                                              |                           |                                   |
| Processing status:                   | Funding - Confirmation of Enrolment                               |                                                                                                                                              |                           |                                   |
| Institution:                         | EUAL - LAKEHEAD UNIVERSITY                                        |                                                                                                                                              |                           |                                   |
| Study Period(s):                     | August 22, 2022 - April 25, 2023 (35 weeks)                       |                                                                                                                                              |                           |                                   |
| Student Status:                      | Single Independent                                                |                                                                                                                                              |                           |                                   |
|                                      |                                                                   |                                                                                                                                              | <a href="#">EDIT &gt;</a> | <a href="#">VIEW AUDIT &gt;</a>   |
| Supporting Documentation             |                                                                   |                                                                                                                                              |                           |                                   |
| Approved Application Documentation ▾ |                                                                   |                                                                                                                                              |                           |                                   |
| Code:                                | Description:                                                      | Severity:                                                                                                                                    | Status:                   | Action:                           |
|                                      | Master Student Financial Assistance Agreement (MSFAA)             | Funding                                                                                                                                      | Approved                  | <a href="#">VIEW DETAILS &gt;</a> |
| 039                                  | Your Declaration and Signature Pages                              | Funding                                                                                                                                      | Approved                  |                                   |
| 043                                  | <b>Student Profile - Proof of Persistent/Prolonged Disability</b> | Additional Funding                                                                                                                           | Approved                  |                                   |
| Academic Year: 2022-2023             |                                                                   |                                                                                                                                              |                           |                                   |

| Profile Documentation    |                                            |          |  |                                                           |
|--------------------------|--------------------------------------------|----------|--|-----------------------------------------------------------|
| Student Information      |                                            |          |  | Action:                                                   |
| Name:                    |                                            |          |  | <a href="#">RETURN TO APPLICATION &gt;</a>                |
| SIN:                     |                                            |          |  |                                                           |
| OAN:                     |                                            |          |  |                                                           |
| OEN:                     |                                            |          |  |                                                           |
|                          |                                            |          |  | <a href="#">EDIT &gt;</a> <a href="#">VIEW AUDIT &gt;</a> |
| Profile Documentation    |                                            |          |  |                                                           |
| Approved Documentation ▾ |                                            |          |  |                                                           |
| Code                     | Description                                | Status   |  |                                                           |
| 043                      | Proof of Persistent/Prolonged Disability ▾ | Approved |  |                                                           |
| Academic Year: 2022-2023 |                                            |          |  |                                                           |

### Step 3: Update the Image Portal Work Queue

The last step is to update the document's status in the Image Administrative Portal work queue.



See the latest version of the **Image Administrative Portal Systems Guide** for details on how to update a document's status.

## Process: Updating the Status for Category 2 Required Documents

### Step 1: Review Supporting Documents

Review the documentation provided. Refer to [Profile Field Requirements and Supporting Documents](#) as needed for documentation requirements.

The action taken depends on the outcome of your review, as follows.

**Action: Documentation is Acceptable Proof to Support a Change**

Update the field based on the information in the documentation



Most Category 2 related profile changes are done as an effective date. Refer to [Profile Field Requirements and Supporting Documents](#) for the correct method to update the field.

In [Step 2: Update Required Document Status](#) you will change the document's status to **Approved**.

**Action: Documentation is Not Acceptable**

Do not make any changes to the information in the profile field.

Create an Information Request through the student's funding application account to let them know the reason(s) for the denial.

In [Step 2: Update Required Document Status](#), you will change the document's status to **Denied**.

**Action: Student Submitted the Change in Error**

The student's documentation may state they requested the change in error. As an FYI, once the student clicks on "change required", they cannot "un-click" it.

Do not make any changes to the information in the profile field.

In [Step 2: Update Required Document Status](#), you will change the document's status to **Waived**.

**Step 2: Update Required Document Status**

From **Profile Documentation**, click **EDIT**.

|                          |                                  |          |        |              |
|--------------------------|----------------------------------|----------|--------|--------------|
|                          |                                  |          | EDIT > | VIEW AUDIT > |
| Profile Documentation    |                                  |          |        |              |
| Required Documentation ▾ |                                  |          |        |              |
| Code                     | Description                      | Status   |        |              |
| 031                      | Proof of Disability - 10/06/2022 | Required |        |              |
| Approved Documentation > |                                  |          |        |              |

- Use the dropdown list to select the **Status** that corresponds to your decision for the documentation.
  - Approved** = documentation provided was acceptable.
  - Denied** = documentation provided was not acceptable to proceed with making the change requested.

- **Waived** = student requested change in error. No change is required.

| Profile Documentation    |                            |            |
|--------------------------|----------------------------|------------|
| Required Documentation ▼ |                            |            |
| Code                     | Description                | Status     |
| 028                      | Proof of Name - 03/02/2020 | Required ▼ |
|                          |                            | Approved   |
|                          |                            | Denied     |
|                          |                            | Required   |
|                          |                            | Waived     |
|                          |                            | CANCEL >   |
|                          |                            | SAVE >     |

### Step 3: Update the Image Portal Work Queue

The last step is to update the document's status in the Image Administrative Portal work queue.



See the latest version of the **Image Administrative Portal Systems Guide** for details on how to update a document's status.

### Profile Document Severity Status

Effective 2020-21, the ministry introduced a new severity status for documentation that will not prevent the release of OSAP funding but will impact specific eligibility. Below is a list of supporting documentation with the **Additional Funding** severity status:

- Proof of Disability: Prevents the release of CSG-D only – Permanent disability (048) or persistent/prolonged disability status (043)
- Proof of Disability Status Change (031)
- Proof of Indigenous Status: Assessed without student fixed contribution waiver (085)

Proof of Indigenous Status Change (086)

| Supporting Documentation |                                                                         |                    |          |                       |
|--------------------------|-------------------------------------------------------------------------|--------------------|----------|-----------------------|
| Required Documentation ▼ |                                                                         |                    |          |                       |
| Code:                    | Description:                                                            | Severity:          | Status:  | Action:               |
| 017                      | Proof of Marital Status >                                               | Funding            | Required |                       |
| 028                      | Student Profile - Proof of Name - 05/03/2021                            | Third Party        | Denied   |                       |
| 029                      | Student Profile - Proof of Date of Birth - 05/03/2021                   | Third Party        | Denied   |                       |
| 031                      | Student Profile - Proof of Disability - 05/03/2021                      | Additional Funding | Denied   |                       |
| 043                      | Student Profile - Proof of Persistent/Prolonged Disability - 01/08/2022 | Additional Funding | Required | VIEW UPLOAD HISTORY > |
| 050                      | Your Declaration and Signature Pages                                    | Third Party        | Required |                       |
| 075                      | Proof of Child's Date of Birth >                                        | Funding            | Required |                       |
| 083                      | Student Profile - Proof of Crown Ward - 05/03/2021                      | Third Party        | Denied   | VIEW UPLOAD HISTORY > |
| 086                      | Student Profile - Proof of Indigenous Status - 05/03/2021               | Additional Funding | Required | VIEW UPLOAD HISTORY > |



The severity status is only displayed within the application required documentation list

Once the documentation is satisfied, an additional Confirmation of Enrolment will be created to release CSG-D. Students with outstanding ***Proof of Indigenous Status*** documentation will be reassessed and another Confirmation of Enrolment will be created based on eligibility for additional funding.



Refer to the ***2022-23 Full-Time OSAP Policy Manual*** for the criteria for accepting these documents.

## ***SIR Check Details***

### ***What is a SIR Check?***

A Social Insurance Registry (SIR) check is done to verify the accuracy of personal identifiers provided by the student to the associated SIN.

The verification is performed by Employment and Social Development Canada (ESDC). ESDC compares information provided by the ministry to information held by the Social Insurance Registration Office.

Processing will not occur on the student's funding application until their SIR check has a status = pass.

### ***Information Used in the SIR Check***

The following information is sent to ESDC for purposes of the student's SIR check:

- Social Insurance Number
- First and last name
- Date of birth

### ***SIR Check Triggers***

A SIR check is triggered with any of the following events:

- OSAP new user registration (creation of new profile).
- A change to first or last name, date of birth and/or gender in an existing profile.
- Submission of a new funding application within an academic year that does not already have an existing SIR check with a status = pass.
- A request manual triggered by the ministry.

### ***Academic Year Assigned to a SIR Check***

The OSAP academic year runs from August 1 to July 31 of the following year.

The date the SIR check is triggered determines what academic year it is assigned to. This may not be the same as the academic year as the funding application submitted by the student.

If the student submits a subsequent application after August 1 of the same year a new SIR check is automatically requested.

## Timeframe for a SIR Check

The ministry sends SIR Check requests to ESDC once a day.

It normally takes between 24-48 hours for a response to be received from ESDC and updated on the student's profile.

## SIR Check Status Options

The SIR Check Details can display any one of the following status:

- **In progress:** The SIR Check has been triggered but no response has been received back from ESDC.
- **Pass:** The SIR Check results are satisfactory.
- **Under Review:** ESDC requires additional time to complete the SIR check process.
- **Fail – Invalid SIN:** ESDC's determination is that the SIN is not valid.
- **Fail – BPI Mis-match:** ESDC has identified a discrepancy between the information provided by the ministry versus the data held by the Social Insurance Number Registry.

The SIR check must have a status = Pass for application processing to continue.

## Locating SIR Check Details

SIR check details can be accessed from at two different locations:

- From the **SIR Check Details** link found in the left navigation bar on all Profile screens.
- From **Third Party Details** within the student's funding application.

| Third Party Details            |               |                           |
|--------------------------------|---------------|---------------------------|
| Third Party:                   | Event Status: | Action:                   |
| Credit Check                   | Complete      | <a href="#">VIEW &gt;</a> |
| Distance Calculation - Student | Complete      | <a href="#">VIEW &gt;</a> |
| Distance Calculation - Parents | Complete      |                           |
| SIN Registry Check             | Complete      | <a href="#">VIEW &gt;</a> |

Both options will lead to **SIR Check – Current Status**. You can access the following details about the latest and all prior SIR checks:

- Request Number
- SIR check status
- Request Date
- Response Date

- Academic year

| SIR Check - Current Status     |         |                  |                  |                |
|--------------------------------|---------|------------------|------------------|----------------|
| Request No.:                   | Status: | Request Date:    | Response Date:   | Academic Year: |
| 5                              | Pass    | February 3, 2022 | February 4, 2022 | 2021-2022      |
| <b>Previous SIR Requests</b> ▼ |         |                  |                  |                |
| Request No.:                   | Status: | Request Date:    | Response Date:   | Academic Year: |
| 4                              | Pass    | March 25, 2020   | March 26, 2020   | 2019-2020      |
| 3                              | Pass    | February 7, 2019 | February 8, 2019 | 2018-2019      |
| 2                              | Pass    | March 19, 2018   | March 20, 2018   | 2017-2018      |
| 1                              | Pass    | March 8, 2016    | March 9, 2016    | 2015-2016      |

## SIR Checks that are in Progress or Failed

A current SIR check that is either in progress or failed will also present on **Student Summary**.

| Student Summary      |                      |                     |                    |
|----------------------|----------------------|---------------------|--------------------|
| Student Information  |                      |                     | Action:            |
| Name:                | <input type="text"/> |                     | ACADEMIC SUMMARY > |
| SIN:                 |                      |                     |                    |
| OAN:                 |                      |                     |                    |
| OEN:                 |                      |                     |                    |
| • OTG/OSG-Base Terms |                      |                     |                    |
| Profile Status       |                      |                     |                    |
| Description:         | Date:                | Status:             | Action:            |
| SIR Check:           | Jun 13, 2022         | Fail - BPI Mismatch | VIEW >             |
| Application(s)       |                      |                     |                    |

## Communication to Student re: Failed SIR Check

The student will be notified when the SIR Check fails for either of the following reasons:

- [Fail – Invalid SIN](#)
- [Fail – BPI Mis-match](#)

The ministry will notify the student in writing about the SIR check failure. A [copy of the communication](#) can be viewed in the profile's **Student Communications History**.

## Fail-Invalid SIN

An invalid SIN result triggers a **Confirmation of Social Insurance Number** notice.

The student provided the SIN included in their profile. The action required by the student depends on whether the SIN is accurate.

### ***SIN is Accurate***

Student is directed to contact the nearest Service Canada office to discuss the steps needed to resolve this situation.

If the steps taken resolve the issue, the ministry will be notified directly by ESDC.

### ***SIN is Not Accurate***

Student must re-register for OSAP using their correct SIN.

If possible, notify the ministry of the incorrect SIN usage. The ministry will investigate and take the appropriate action. This may include deleting the incorrect profile.

### **Fail - BPI Mis-Match**

A failed SIR check with a BPI mis-match result triggers a **Confirmation of Personal Information** notice.

The student is provided the first name, last name, and date of birth found on their profile. The action required by the student depends on whether the SIN is accurate.

### ***BPI Information is Accurate***

Student is directed to contact the nearest Service Canada office to discuss their situation and the steps as needed to resolve it.

If the steps taken resolve the issue, the ministry will be notified directly by ESDC.

### ***BPI Information is Not Accurate***

The student must provide you with documentation as proof of the correct information.



Do not update the profile field(s) in question until the student has provided acceptable documentation.

Any changes to information in the first and last name, or date of birth fields will automatically trigger a new SIR check.

## OEN Check Details

### What is an OEN Check

An Ontario Education Number (OEN) is a student identification number assigned to Ontario elementary and secondary students by the Ministry of Education (EDU).

The OEN check verifies the OEN on the student's profile is the same OEN assigned to the student. The check is performed by EDU.

### Timeframe for an OEN Check

OEN checks are requested in real-time (as soon as the OEN is provided).

### OEN Check Triggers

The OEN check is automatically triggered when:

- An OEN is added to the profile the first time.
- An existing OEN is updated with a new OEN.

### Locating OEN Check Details

Use the **OEN Check Details** link found in the left navigation bar on all Profile screens to access all check results.

From **OEN Check – Current Status** you can access the following details about the latest and all prior OEN checks (if applicable):

- Request Number
- OEN check status
- OEN number
- Request Date
- Response Date
- Academic year
- The source of the OEN check request. Normally it indicate "System" based on the automated request. However, a ministry user can also trigger the OEN check.

|                                                                                                                |                    |                      |                   |                   |                | <a href="#">VIEW AUDIT &gt;</a> |
|----------------------------------------------------------------------------------------------------------------|--------------------|----------------------|-------------------|-------------------|----------------|---------------------------------|
| <b>OEN Check - Current Status</b>                                                                              |                    |                      |                   |                   |                |                                 |
| Request No.:                                                                                                   | Status:            | OEN Number:          | Request Date:     | Response Date:    | Academic Year: | User:                           |
| 7                                                                                                              | Valid              | <input type="text"/> | November 25, 2022 | November 25, 2022 | 2022-2023      | System                          |
| <b>Previous OEN Requests</b>  |                    |                      |                   |                   |                |                                 |
| Request No.:                                                                                                   | Status:            | OEN Number:          | Request Date:     | Response Date:    | Academic Year: | User:                           |
| 6                                                                                                              | OEN does not match | <input type="text"/> | October 19, 2015  | October 19, 2015  | 2015-2016      | <input type="text"/>            |

### OEN Check Status Options

The **OEN Check Details** will display one of the following statuses:

- **Valid:** OEN check results are satisfactory
- **OEN does not match**
- **OEN service not available:** OEN will be included in next check request sent to EDU.

If the screen does not have any request details, the student has not provided their OEN.

There are no processing implications if the OEN check does not generate a match or if the service was not available.

### OEN Check Communications

There are no communications related to any OEN check results.

## Student Restrictions

### Background

The administration of student restrictions was added to the web-based OSAP administrative system on February 24, 2020.

All existing student restriction information that was housed in the old LOB restriction system was migrated into the student's profile.



As a result of that migration, access to the restriction screens in the LOB was limited to “view only” and all update functionality was suspended.

### Changes to Academic Progress Restrictions and Warnings

As part of the migration, all academic progress warnings and restriction details were separated out into a separate administrative process.

Academic progress information will **not** be presented within **Student Restrictions**.

See chapter, [Academic Progress](#) for complete details on the web-based academic progress administrative system.

### Accessing Student Restriction Details

The **Student Restrictions** link on the left navigation bar takes you directly to **Student Restrictions**.

### Restriction Details

**Student Restrictions** will display active restrictions assigned to the student.

Each restriction will have the following information presented:

- A **description** that indicates if the restriction was assigned by the federal or provincial component of the program.
- The **effective date** of the restriction (if applicable)
- A dollar **amount** originally assigned to the restriction (if applicable)

|                      |                                                 |                      |              |         |
|----------------------|-------------------------------------------------|----------------------|--------------|---------|
|                      |                                                 | VIEW AS400 HISTORY > | VIEW AUDIT > |         |
| Student Restrictions |                                                 |                      |              |         |
| Code:                | Description:                                    | Effective Date:      | Amount:      | Action: |
|                      | Provincial restriction: student to contact MTCU | May 1, 2019          | 10,940       |         |
|                      | HRSDC - CSLP Restriction                        | May 3, 2022          | 6,930        |         |

## Description

A high-level description of each restriction is presented for each restriction code. Example:

- HRSDC – CSLP restriction
- Provincial Restriction: student to contact MTCU

Ultimately it is the student's responsibility to contact the applicable level of government to get more information on the restriction(s) impacting their funding applications and what steps (if any) they can take to resolve the restriction.

View their account in the **FAO Student Inquiry Portal** to see the instructions provided to the student about each restriction.

## Effective Date

Some restrictions are assigned an effective date. This date determines whether the restriction impacts the student's current application versus future applications.

The restriction impact, if any, will be found in the **Processing Summary** for the student's funding application.

## Amount

The restriction may include an amount owing at the time the restriction was originally assigned.



The amount listed is not updated to reflect any interest or payments that may have been made since the restriction was assigned.

## Action

There will be no actions listed in this column. Only defined ministry users can add or edit restriction details.

## Audit History

There are two categories of audit history that can be present on **Student Restrictions**:

- audit history from all web-based restriction activity
- audit history from the AS/400 system

|                      |                                                 |                                         |         |         |                                 |
|----------------------|-------------------------------------------------|-----------------------------------------|---------|---------|---------------------------------|
|                      |                                                 | <a href="#">VIEW AS400 HISTORY &gt;</a> |         |         | <a href="#">VIEW AUDIT &gt;</a> |
| Student Restrictions |                                                 |                                         |         |         |                                 |
| Code:                | Description:                                    | Effective Date:                         | Amount: | Action: |                                 |
|                      | Provincial restriction: student to contact MTCU | May 1, 2019                             | 10,940  |         |                                 |
|                      | HRSDC - CSLP Restriction                        | May 3, 2022                             | 6,930   |         |                                 |

## Audit History for Web-Based Restriction Activity

Click **View Audit** from **Student Restrictions** to see all restriction activity since the launch of the web-based restriction system.

**Student Restrictions Audit** lists all restriction activities, including additions and deletions.

Information presented includes:

- The **date and time** of the activity
- The **field name** ("Restriction code")
- The **before and after values** associated with the change
- The **user** that made the change. Any restrictions included in the migration of restriction data will display **User** as "Migration".

| Student Restrictions Audit |                   |               |                                |                      |
|----------------------------|-------------------|---------------|--------------------------------|----------------------|
| Date and Time: ▲           | Field Name:       | Before Value: | After Value:                   | User: ▼              |
| Nov 19/2020<br>8:31 AM     | Restriction Code: |               | Added - <a href="#">View</a>   | <input type="text"/> |
| Nov 19/2020<br>8:31 AM     | Restriction Code: |               | Deleted - <a href="#">View</a> | <input type="text"/> |
| Jan 29/2020<br>5:17 PM     | Restriction Code: |               | Added - <a href="#">View</a>   | Migration            |

To view additional details specific to an activity, click **View** in **After Value**. This will reveal the high-level description of the restriction as well as the associated dollar amount (if applicable).

| Student Restrictions Audit |                   |               |                                            |                      |
|----------------------------|-------------------|---------------|--------------------------------------------|----------------------|
| Date and Time: ▲           | Field Name:       | Before Value: | After Value:                               | User: ▼              |
| Nov 19/2020<br>8:31 AM     | Restriction Code: |               | Added - <a href="#">View</a>               | <input type="text"/> |
|                            | Restriction Code  |               |                                            |                      |
|                            | Description       |               | Full Restriction:<br>contact MTCU, Toronto |                      |
|                            | Effective Date    |               | Jan 01, 2017                               |                      |

## Audit History of Restrictions from the AS/400

Click **View AS400 History** from **Student Restrictions**.

A list of all restriction-related activities that occurred in the LOB is presented on **AS400 Restrictions History**.

Information presented includes:

- The **date and time** of the activity
- A high-level **description** of the restriction

- The **effective date** associated with the restriction (if applicable)
- The dollar **amount** associated with the restriction (if applicable).
- The **type** of change made. Types of change include:
  - Insert (add)
  - Delete (remove)

|                               |                   |  |                                                      |           |
|-------------------------------|-------------------|--|------------------------------------------------------|-----------|
| <b>Jan 29/2020</b><br>5:17 PM | Restriction Code: |  | <b>Added - View</b>                                  | Migration |
|                               | Restriction Code  |  |                                                      | Migration |
|                               | Description       |  | Provincial<br>Restriction:student to<br>contact MTCU | Migration |
|                               | Effective Date    |  | Jan 01, 2017                                         | Migration |
|                               | Amount            |  | 321                                                  | Migration |

## Academic Progress

### Background

All existing academic progress information that was housed in the old LOB restriction system was migrated into the student's profile as of February 24, 2020.

During this migration, academic progress issues were separated from all other student restrictions. Academic progress information is no longer included within [Student Restrictions](#).

The administration of academic progress warnings and restrictions is now done through the student's profile. As a result, access to the academic progress functionality in the LOB was suspended.

### Accessing Academic Progress Details

The **Academic Progress** link on the left navigation bar takes you directly to **Academic Progress**.

Each profile will include the student's **Academic Progress** status. This includes students with no prior or current academic progress issues.

### Understanding the Academic Progress Status Options

The web-based academic progress system does not use the academic progress codes previously found in the old LOB administrative system. Instead, they have been replaced with academic progress statuses.

The student's current or previous status(es) will be one of the following:

- [Good Standing](#)
- [Good Standing \(Previous Probation\)](#)
- [Good Standing \(Previously Restricted\)](#)
- [Academic Probation](#)
- [Full Academic Restriction <plus instance counter>](#)



See the latest version of the **OSAP for Full-Time Students Policy Manual** for academic progress policies.

### Good Standing

Good standing is assigned for a student without prior or current academic progress issues.

### Good Standing (Previous Probation)

The status Good Standing (Previous Probation) indicates the student was previously on academic probation, but the probation period is now over.

This status replaced the “Code 37” on the LOB.

### Good Standing (Previously Restricted)

The status Good Standing (Previous Restriction) indicates the student was previously on a full academic restriction, but the restriction period is now over.

This status replaced the “Code 37” on the LOB.

### Academic Probation

The student has been placed on academic probation.

This status replaced the “Code 36” on the LOB.

In the web-based system, an academic probation status is not included in the academic progress instance counter.

When the academic progress information was migrated from the LOB, the instance counter for students who only ever had a code 36 was reset to zero (0).



A Code 035 supporting document will be generated on an OSAP-FT application when a student has been placed on academic probation. The description will show Proof of Academic Progress (Academic Probation) to clearly differentiate from supporting document Code 36 Proof of Academic Progress (Automated File Check).

### Full Academic Restriction <plus instance counter>

The student has been placed on a full academic progress restriction.

A status of Full Academic Restriction will include an instance counter (example: First Instance, Second Instance). The instance number indicates the severity and time frame associated with the restriction.

This status replaced the “Code 65” on the LOB.

In the web-based system, academic probation status is not included in the academic progress instance counter.

When the academic progress information was migrated from the LOB, students who were assigned a code 65 had their instance counter reduced by one (1).

## Understanding the Academic Progress Screen Layout

The Academic Progress landing screen is separated into two sections:

- The student's current academic progress status, and
- Their academic progress history (previous statuses)

Each section will include the following information for the entry listed:

- Status (current or previous)
- Effective Date (current) or Time Period (previous statuses)
- actions available to adjust the current status.

|                                       |                             |                                                                                             |                                 |
|---------------------------------------|-----------------------------|---------------------------------------------------------------------------------------------|---------------------------------|
|                                       |                             | <a href="#">VIEW AS400 HISTORY &gt;</a>                                                     | <a href="#">VIEW AUDIT &gt;</a> |
| Academic Progress                     |                             |                                                                                             |                                 |
| Current Status:                       | Effective Date:             | Action:                                                                                     |                                 |
| Academic Probation                    | Mar 03, 2022                | <a href="#">EDIT &gt;</a><br><a href="#">UPGRADE &gt;</a><br><a href="#">DOWNGRADE &gt;</a> |                                 |
|                                       |                             |                                                                                             |                                 |
| Academic Progress History ▾           |                             |                                                                                             |                                 |
| Previous Status:                      | Time Period:                | Action:                                                                                     |                                 |
| Good Standing (Previously Restricted) | Apr 25, 2021 - Mar 02, 2022 | <a href="#">EDIT &gt;</a>                                                                   |                                 |

## Working with Student's Academic Progress Status

Any changes to the student's current academic progress status is started from **Academic Progress**. The actions presented depend on the student's current academic progress status.

The remainder of this section will outline making changes to the student's current academic progress status. The change options are:

- [Upgrading](#) academic progress status
- [Downgrading](#) academic progress status
- [Editing](#) academic progress status



Contact the ministry if a change is needed to information presented in the student's **Academic Progress History**.

## Upgrading the Student's Current Academic Progress Status

Upgrading the student's current status means the student has not met the conditions for satisfactory academic progress.

The option to upgrade the student's status is presented when their current status is any one of the three versions of Good Standing (<blank>, Previous Probation, Previous Restriction).

To start the upgrade process, click **Upgrade** found in the **Action** column on **Academic Progress**. You will then make the following changes on **Academic Progress Upgrade**:

1. Choose the student's new **Academic Status** from the dropdown list. Your options are:
  - Academic Probation
  - Full Academic Restriction
2. The **Effective Date** of the change will default to the current date. To change the Effective Date can either:
  - Key the date in the following format: DDMMYYYY, or
  - Select the date using the interactive calendar.

3. If **Academic Status** = Full Academic Restriction:

The default presentation of the restriction **Instance** is based on the student's academic progress history. It uses the current count and adds "1" to present what the expected instance should be.

You can change the instance for the upgrade using the dropdown list. Your options are:

- First
  - Second
  - Third
  - Fourth (or higher)
4. Choose whether you would like a letter automatically sent to the student advising them of the change to their automatic status. Your options are:
    - Yes
    - No

The letter generated will correspond to the **Academic Status** and **Instance** (if applicable) shown on screen.

| Academic Progress Upgrade                                                                      |                                                                                              |                                                          |
|------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|----------------------------------------------------------|
| Academic Status:                                                                               | Full Academic Restriction                                                                    | <a href="#">SAVE &gt;</a><br><a href="#">CANCEL &gt;</a> |
| Effective Date (DDMMYYYY):                                                                     | 28112022  |                                                          |
| Instance:                                                                                      | Second    |                                                          |
| Would you like to have the Academic Restriction 3 Yr letter automatically sent to the student? | <input checked="" type="radio"/> Yes <input type="radio"/> No                                |                                                          |
| Enter institution code:                                                                        | EUAL                                                                                         |                                                          |

5. If your response to **Send letter to student** = yes:
  - **Institution Code** will pre-fill with the code corresponding to the school your access is associated with.
  - If your access is for more than one school, enter the **Institution Code** that corresponds to the status change.
8. Click **Save** to submit the upgrade and trigger any correspondence required.

If you requested a letter to be generated, Academic Progress will now include an alert indicating Academic Progress **Communications** exist.

| Academic Progress <b>Communications</b> exist.  |                 |                                                             |
|----------------------------------------------------------------------------------------------------------------------------------|-----------------|-------------------------------------------------------------|
| <a href="#">VIEW AS400 HISTORY &gt;</a>                                                                                          |                 | <a href="#">VIEW AUDIT &gt;</a>                             |
| Academic Progress                                                                                                                |                 |                                                             |
| Current Status:                                                                                                                  | Effective Date: | Action:                                                     |
| Full Academic Restriction<br>Second Instance                                                                                     | Nov 28, 2022    | <a href="#">EDIT &gt;</a><br><a href="#">DOWNGRADE &gt;</a> |
| <a href="#">Academic Progress History &gt;</a>                                                                                   |                 |                                                             |

The academic progress communications alert only appears on Academic Progress. The alert on Student Summary is different. It indicates Academic Progress Information Exists.

| Student Summary                                                                        |                                                                                     |                                       |
|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---------------------------------------|
| Student Information                                                                    |                                                                                     | Action:                               |
| Name:                                                                                  |  | <a href="#">ACADEMIC SUMMARY &gt;</a> |
| SIN:                                                                                   |                                                                                     |                                       |
| OAN:                                                                                   |                                                                                     |                                       |
| OEN:                                                                                   |                                                                                     |                                       |
| <ul style="list-style-type: none"> <li>Academic Progress Information Exists</li> </ul> |                                                                                     |                                       |
| Application(s)                                                                         |                                                                                     |                                       |

### Downgrading the Student's Current Academic Progress Status

Downgrading the student's current academic status means the student has satisfied the conditions of their academic probation or full restriction.

The option to downgrade the student's status is presented when their current status is either Academic Probation or Full Academic Restriction.

To start the downgrade process, click **Downgrade** found in the **Action** column on **Academic Progress**.

You will then make the following changes on **Academic Progress Downgrade**:

1. The presentation of the new **Academic Status** will default to the natural progression from their current status. Use the dropdown list to change the option presented if needed. Your options are:
  - Good Standing (Previous Probation)
  - Good Standing (Previously Restricted)
2. The **Effective Date** of the change will default to the current date. To change the Effective Date can either:
  - Key the date in the following format: DDMMYYYY, or
3. Select the date using the interactive calendar. Click **Save** to submit the downgrade request.

| Academic Progress Downgrade |                                                                                                |                                        |
|-----------------------------|------------------------------------------------------------------------------------------------|----------------------------------------|
| Academic Status:            | Good Standing (Previously Restricted) ▼                                                        | <b>SAVE &gt;</b><br><b>CANCEL &gt;</b> |
| Effective Date (DDMMYYYY):  | 28112022  |                                        |



No communications are generated to the student as part of downgrade process.

Note: If attempting to downgrade an academic restriction/probation after the study period has began, the effective date must be prior to the study period start date to remove the application restriction and/or supporting documentation. If the academic progress downgrade effective date is after the start date, the application will remain in restricted/academic progress required status.

If the restriction/probation period has elapsed prior to the study period start date, the effective date of the academic progress transaction should be set to the study period start date minus one day.

Example: Academic 1 Year Restriction elapsed August 5<sup>th</sup>, 2022. Full-time 2022-23 OSAP application start date is September 6, 2022. If academic progress clearance documentation is reviewed AFTER September 6, 2022, the downgrade effective date can be adjusted to the day prior to the start date (September 5, 2022).

## Editing the Student's Current Academic Progress Status

You have the option to edit the current academic status if incorrect information was entered during either the [upgrade](#) or [downgrade](#) process.

The option to edit the student's current status details is presented when their current status is anything except [Good Standing](#).

To start the process, click **Edit** found in the **Action** column on **Academic Progress**.

Academic Progress Edit will be presented with all fields in edit mode.

| Academic Progress Edit     |                                                                                              |                                                                                         |
|----------------------------|----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| Academic Status:           | Full Academic Restriction ▼                                                                  | <a href="#">SAVE &gt;</a><br><a href="#">CANCEL &gt;</a><br><a href="#">REVERT &gt;</a> |
| Effective Date (DDMMYYYY): | 28112022  |                                                                                         |
| Instance:                  | Second ▼                                                                                     |                                                                                         |

Make the changes as required.

## Academic Progress “Revert”

Functionality was released within the Student Profile, Academic Progress system to allow FAA's to “revert” academic probation/restriction transactions. This will allow FAA's to reverse an academic progress or academic restriction entry from the system, removing the academic instance.

This functionality should only be used in certain scenario's and should not be used to downgrade a valid academic probation/restriction scenario.



Note: Refer to the **2022-23 Full-Time OSAP Policy Manual**, Academic Progress Section for more details on when the “revert” function can be used.

## How to Access the New “Revert” Functionality

The Academic Probation/Restriction “Revert” functionality can be accessed through the “Academic Progress” link located on the left nav bar within the student profile. Once inside the Academic Progress screen, select the “Edit” link under the “Action” column.

| <b>Work With Student Profile</b> ▾<br>▶ Student Summary<br>▶ Student Profile Details<br>▶ Profile Documentation<br>▶ SIR Check Details<br>▶ OEN Check Details<br>▶ Student Restrictions<br>▶ Academic Progress<br>▶ Bursary Recording<br><b>Administrative Functions</b> ▾<br>▶ Student Communications<br>▶ Enter Application<br>▶ Reset Password<br>▶ Student Profile Comments<br>▶ Student Hold | <b>Academic Progress</b><br><table border="1"> <tr> <th colspan="2">Student Information</th> <th>Action:</th> </tr> <tr> <td>Name:</td> <td>BRACE LET</td> <td rowspan="4"><a href="#">VIEW ACADEMIC SUMMARY &gt;</a></td> </tr> <tr> <td>SIN:</td> <td>106710353</td> </tr> <tr> <td>OAN:</td> <td>810120701</td> </tr> <tr> <td>OEN:</td> <td></td> </tr> </table> <p>Academic Progress <b>Communications</b> exist.</p> <p><a href="#">VIEW AS400 HISTORY &gt;</a> <a href="#">VIEW AUDIT &gt;</a></p> <table border="1"> <tr> <th>Current Status:</th> <th>Effective Date:</th> <th>Action:</th> </tr> <tr> <td>Full Academic Restriction<br/>Second Instance</td> <td>Nov 28, 2022</td> <td> <a href="#">EDIT &gt;</a><br/> <a href="#">DOWNGRADE &gt;</a> </td> </tr> </table> <p><a href="#">Academic Progress History &gt;</a></p> | Student Information                                         |  | Action: | Name: | BRACE LET | <a href="#">VIEW ACADEMIC SUMMARY &gt;</a> | SIN: | 106710353 | OAN: | 810120701 | OEN: |  | Current Status: | Effective Date: | Action: | Full Academic Restriction<br>Second Instance | Nov 28, 2022 | <a href="#">EDIT &gt;</a><br><a href="#">DOWNGRADE &gt;</a> |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|--|---------|-------|-----------|--------------------------------------------|------|-----------|------|-----------|------|--|-----------------|-----------------|---------|----------------------------------------------|--------------|-------------------------------------------------------------|
| Student Information                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Action:                                                     |  |         |       |           |                                            |      |           |      |           |      |  |                 |                 |         |                                              |              |                                                             |
| Name:                                                                                                                                                                                                                                                                                                                                                                                             | BRACE LET                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <a href="#">VIEW ACADEMIC SUMMARY &gt;</a>                  |  |         |       |           |                                            |      |           |      |           |      |  |                 |                 |         |                                              |              |                                                             |
| SIN:                                                                                                                                                                                                                                                                                                                                                                                              | 106710353                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                             |  |         |       |           |                                            |      |           |      |           |      |  |                 |                 |         |                                              |              |                                                             |
| OAN:                                                                                                                                                                                                                                                                                                                                                                                              | 810120701                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                             |  |         |       |           |                                            |      |           |      |           |      |  |                 |                 |         |                                              |              |                                                             |
| OEN:                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |                                                             |  |         |       |           |                                            |      |           |      |           |      |  |                 |                 |         |                                              |              |                                                             |
| Current Status:                                                                                                                                                                                                                                                                                                                                                                                   | Effective Date:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Action:                                                     |  |         |       |           |                                            |      |           |      |           |      |  |                 |                 |         |                                              |              |                                                             |
| Full Academic Restriction<br>Second Instance                                                                                                                                                                                                                                                                                                                                                      | Nov 28, 2022                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <a href="#">EDIT &gt;</a><br><a href="#">DOWNGRADE &gt;</a> |  |         |       |           |                                            |      |           |      |           |      |  |                 |                 |         |                                              |              |                                                             |

From within the Academic Progress Edit screen, a new “Revert” option is now available.

| Academic Progress Edit     |                             |                                                                                         |
|----------------------------|-----------------------------|-----------------------------------------------------------------------------------------|
| Academic Status:           | Full Academic Restriction ▾ | <a href="#">SAVE &gt;</a><br><a href="#">CANCEL &gt;</a><br><a href="#">REVERT &gt;</a> |
| Effective Date (DDMMYYYY): | 28112022                    |                                                                                         |
| Instance:                  | Second ▾                    |                                                                                         |

### Using the Academic Progress “Revert”

When selected, the “Revert” link will reverse the most recent Academic Progress Upgrade or Downgrade transaction processed on the file.

Example:

- If reverting an Academic Restriction transaction, the Academic Progress status will be reverted back to Academic Probation.
- If reverting an Academic Probation transaction, the file will be set back to the most recent Academic Progress status (“Good Standing” or “Academic Restriction”).

You can also “revert” a downgrade transaction, to return the Academic Progress status to probation/restriction. The academic Instance counter will be reset back to its previous counter in all scenarios for an Academic Restriction revert.

Click **Save** when you are done making the changes to the information presented.

A record of the “Revert” transaction will be maintained in the Academic Progress Audit screen to display the before and after Academic Progress status.

| Academic Progress Audit |                                  |                           |                                          |                        |
|-------------------------|----------------------------------|---------------------------|------------------------------------------|------------------------|
| Date and Time: ▲        | Field Name:                      | Before Value:             | After Value:                             | User: ▼                |
| Nov 28/2022<br>9:01 AM  | Full Academic Restriction status |                           | Reverted - View <input type="checkbox"/> | User Guide Demo (EUAL) |
|                         | Current Status                   | Full Academic Restriction | Academic Probation                       | User Guide Demo (EUAL) |
|                         | Effective Date                   | Nov 28, 2022              | Mar 03, 2022                             | User Guide Demo (EUAL) |

## Audit History

There are two categories of audit history that can be present on **Academic Progress**:

- audit history from all web-based academic progress activity
- audit history from the AS/400 system

|                                       |                 | <a href="#">VIEW AS400 HISTORY &gt;</a>                   | <a href="#">VIEW AUDIT &gt;</a> |
|---------------------------------------|-----------------|-----------------------------------------------------------|---------------------------------|
| Academic Progress                     |                 |                                                           |                                 |
| Current Status:                       | Effective Date: | Action:                                                   |                                 |
| Good Standing (Previously Restricted) | Mar 13, 2020    | <a href="#">EDIT &gt;</a><br><a href="#">UPGRADE &gt;</a> |                                 |

## Audit History for Web-Based Academic Progress Activity

Click **View Audit** from **Academic Progress** to see all activity since the launch of this web-based recording system.

**Academic Progress Audit** lists all activity, including any academic progress upgrades and downgrades.

Any academic progress issues that were included in the migration of restriction data will display **User** as “Migration”.

| Academic Progress Audit |                                                          |               |                 |           |
|-------------------------|----------------------------------------------------------|---------------|-----------------|-----------|
| Date and Time: ▲        | Field Name:                                              | Before Value: | After Value:    | User: ▼   |
| Jan 29/2020<br>5:17 PM  | Migrated Status as Good Standing (Previously Restricted) |               | Migrated - View | Migration |

Each audit row presents a summary view of the academic progress issue.

Click **View** located in the **After Value** column to reveal further details about the related activity. The additional details presented include:

- Current Status of the student’s academic progress, including a Before Value (if applicable) and After Value.
- The instance corresponding to the Current Status (if applicable)
- The effective date Current Status (if applicable).

| Academic Progress Audit |                                                                |               |                                          |           |
|-------------------------|----------------------------------------------------------------|---------------|------------------------------------------|-----------|
| Date and Time: ▲        | Field Name:                                                    | Before Value: | After Value:                             | User: ⬆   |
| Jan 29/2020<br>5:17 PM  | Migrated Status as<br>Good Standing<br>(Previously Restricted) |               | <b>Migrated - View</b>                   | Migration |
|                         | Current Status                                                 |               | Good Standing<br>(Previously Restricted) | Migration |
|                         | Instance                                                       |               | First Instance                           | Migration |
|                         | Effective Date                                                 |               | Apr 29, 2014                             | Migration |

### Audit History of Academic Progress Activity from the AS/400

Click **View AS400 History** from *Academic Progress*.

A list of all academic progress activity that occurred in the LOB is presented on **AS400 Academic Progress Restriction History**.

Information presented includes:

- The **date** and **time** of the activity
- A **description** of the academic progress status assigned
- The **effective date** associated with the progress (if applicable)
- The **type** of change made. Types of change include:
  - Insert
  - Change
  - UPGRAD (for an upgraded status change)
  - DNGRAD (for a downgraded status change)
  - Delete

| AS400 Academic Progress Restrictions History |       |                                        |                 |        |         |
|----------------------------------------------|-------|----------------------------------------|-----------------|--------|---------|
| Date/Time: ▼                                 | Code: | Description:                           | Effective Date: | Type:  | User: ⬆ |
| Apr 29/2014<br>09:49 AM                      |       | ACADEMIC INSTANCE CHANGED FROM<br>36-1 |                 | DNGRAD |         |
| Apr 29/2014<br>09:49 AM                      |       | OSAP Acad Progress Warning Status      | Apr 29, 2014    | INSERT |         |
| Apr 29/2014<br>09:49 AM                      |       | OSAP Acad Progress Probationary Status | Apr 29, 2014    | DELETE |         |



Note: Refer to the FAO New Posting dated February 21, 2020 (**Academic Progress Communications**) for information regarding the **Academic Progress Status page** available to a student on their OSAP account.

## Administrative Functions

### Student Communications

The **Student Communications** link on the left navigation bar takes you directly to **Student Communications History**.

**Student Communications History** contains access to communication generated at the profile level. This includes:

- Failed SIR check details (BPI-mismatch, invalid SIN)
- OAN retrieval letter (ministry-generated)
- Password Reset letter (ministry-generated)
- Academic Progress communications (warning and restriction letters)

### Screen Layout: Student Communications History

The following details will be listed for each communication item listed on **Student Communications History**:

- **Communication:** a description of the communication created.
- **Date Requested**
- **Date Sent**
- **Format:** The format will either be Paper or Message Centre.
- The **Status** of the communication. The possible statuses are:
  - Printed: The communication has been printed as a paper document.
  - Sent: The communication has been sent electronically to the student's Message Centre.
  - Requested: The communication has not yet been generated. It will be issued in the nightly communications run.

|                                |                 |             |         | REQUEST COMMUNICATION > | VIEW AUDIT > |
|--------------------------------|-----------------|-------------|---------|-------------------------|--------------|
| Student Communications History |                 |             |         |                         |              |
| Communication:                 | Date Requested: | Date Sent:  | Format: | Status:                 | Actions:     |
| Academic Probation             | Nov 28/2022     |             | Paper   | Requested               | Cancel >     |
| SIR Check Fail                 | Aug 12/2022     | Aug 12/2022 | Paper   | Printed                 | View >       |

### Viewing Student Communication

All communication issued through the student's profile can be viewed in the format it was generated.

1. From **Student Communication History**, click **View** corresponding to the item you wish to see.
2. The communication item will be presented in a separate window in the format it was issued. However, the format for communications sent to Message Centre will not include any links provided to the student.



While all failed SIR communications are generated in paper format, the student can access the same message in their Message Centre.

### How to Re-Issue Previously Generated Communication

1. From the top of **Student Communications History**, click **Request Communication**.

| Student Communications History |                 |             |         |           |          |
|--------------------------------|-----------------|-------------|---------|-----------|----------|
| Communication:                 | Date Requested: | Date Sent:  | Format: | Status:   | Actions: |
| Academic Probation             | Nov 28/2022     |             | Paper   | Requested | Cancel > |
| SIR Check Fail                 | Aug 12/2022     | Aug 12/2022 | Paper   | Printed   | View >   |

2. Click **Request** corresponding to the communication entry to be re-issued. Communications in **blue** have already been requested.

| Communication:            | Predicted Format: | Select:   |
|---------------------------|-------------------|-----------|
| SIR Check                 | Paper             | REQUEST > |
| Academic Probation Letter | Paper             | REQUEST > |
| Ad Hoc Communications     |                   |           |
| Type:                     | Action:           |           |
| Information Request       | Create >          |           |

3. The item will be displayed on the **Student Communication History** window with a status of **Requested**. It will be generated as part of the nightly communications run.

| Student Communications History |                 |            |         |           |          |
|--------------------------------|-----------------|------------|---------|-----------|----------|
| Communication:                 | Date Requested: | Date Sent: | Format: | Status:   | Actions: |
| SIR Check Fail                 | Nov 28/2022     |            | Paper   | Requested | Cancel > |
| Academic Probation             | Nov 28/2022     |            | Paper   | Requested | Cancel > |



An Academic Progress communication can be generated by following the same steps, even if the communication was not previously issued.

### Cancelling a Communication Re-Issue Request

A request to cancel a communication item can occur at any point prior to the nightly communications run.

1. Click **Cancel** corresponding to the item you no longer need to be re-issued.

|                                |                 |            |         |           | REQUEST COMMUNICATION > | VIEW AUDIT > |
|--------------------------------|-----------------|------------|---------|-----------|-------------------------|--------------|
| Student Communications History |                 |            |         |           |                         |              |
| Communication:                 | Date Requested: | Date Sent: | Format: | Status:   | Actions:                |              |
| SIR Check Fail                 | Nov 28/2022     |            | Paper   | Requested | Cancel >                |              |
| Academic Probation             | Nov 28/2022     |            | Paper   | Requested | Cancel >                |              |

2. A pop-up message will appear asking you to confirm the cancellation. To proceed, click **OK**.

Are you sure you want to cancel this communication request?

OK Cancel

3. The status of the request will change to **Cancelled**. The cancellation will be reflected in the communications audit. Click **View Audit** to view the **Student Communication Audit**.

| Student Communication Audit |                    |               |                    |                           |
|-----------------------------|--------------------|---------------|--------------------|---------------------------|
| Date and Time:              | Communication:     | Before Value: | After Value:       | User ID:                  |
| Nov 28/2022<br>10:31 AM     | SIR Check Fail     | Requested     | Cancelled          | User Guide<br>Demo (EUAL) |
| Nov 28/2022<br>10:10 AM     | SIR Check Fail     |               | Requested          | User Guide<br>Demo (EUAL) |
| Nov 28/2022<br>10:02 AM     | Academic Probation |               | Requested - VIEW > | User Guide<br>Demo (EUAL) |

## Editing a Communication Request

When requesting an Academic Progress communication, users with access to more than one institution are prompted to select the school that corresponds to the communication. The selected school can be edited at any point prior to the nightly communications run.

1. Select **Edit** corresponding to the item you need to update.

|                                |                 |             |         |           | REQUEST COMMUNICATION > | VIEW AUDIT > |
|--------------------------------|-----------------|-------------|---------|-----------|-------------------------|--------------|
| Student Communications History |                 |             |         |           |                         |              |
| Communication:                 | Date Requested: | Date Sent:  | Format: | Status:   | Actions:                |              |
| Academic Restriction 3 Yr      | Feb 24/2020     |             | Paper   | Requested | Edit ><br>Cancel >      |              |
| Academic Restriction 3 Yr      | Feb 18/2020     | Feb 18/2020 | Paper   | Printed   | View >                  |              |

2. You will be presented with the institution search page. Search for and select **Request** for the applicable institution.

| Search for an Institution |                                       |                                                        |                       |                     |
|---------------------------|---------------------------------------|--------------------------------------------------------|-----------------------|---------------------|
| Search by                 |                                       |                                                        |                       | Action              |
| Institution Code          | <input type="text"/>                  |                                                        |                       | SEARCH ><br>CLEAR > |
| Institution Name          | <input type="text" value="Lawrence"/> |                                                        |                       |                     |
| Institution Code          | Institution Name                      | Institution Address                                    | Institution ID Number | Action              |
| EVBM                      | ST. LAWRENCE COLLEGE - BROCKVILLE     | 2288 Parkdale Ave.<br>Brockville ON CA<br>K6V5X3       | 54                    | REQUEST >           |
| EVBL                      | ST. LAWRENCE COLLEGE - KINGSTON       | Box 6000 King & Portsmouth<br>Kingston ON CA<br>K7L5A6 | 53                    | REQUEST >           |

- The change will be reflected in the **Student Communications Audit**.

| Student Communication Audit |                           |                                         |                                           |                               |
|-----------------------------|---------------------------|-----------------------------------------|-------------------------------------------|-------------------------------|
| Date and Time:              | Communication:            | Before Value:                           | After Value:                              | User ID:                      |
| Feb 24/2020<br>12:50 PM     | Academic Restriction 3 Yr |                                         | Changed - VIEW                            | Academic Progress Demo (STLA) |
|                             | Institution selected      | EVBL<br>ST. LAWRENCE COLLEGE - KINGSTON | EVBM<br>ST. LAWRENCE COLLEGE - BROCKVILLE |                               |
| Feb 24/2020<br>12:40 PM     | Academic Restriction 3 Yr |                                         | Requested - VIEW                          | Academic Progress Demo (STLA) |

NEW

## How to Create an Information Request

Beginning in 2022-23, FAO Information Requests can now be created at the Student Profile level, as opposed to solely through an application.

- From the top of **Student Communication History** click **REQUEST COMMUNICATION**.

| Student Communications History |                 |            |         |         |                                        |
|--------------------------------|-----------------|------------|---------|---------|----------------------------------------|
| Communication:                 | Date Requested: | Date Sent: | Format: | Status: | Actions:                               |
|                                |                 |            |         |         | REQUEST COMMUNICATION >   VIEW AUDIT > |

- From **Ad Hoc Communications**, click **CREATE** located in the action column.

| Ad Hoc Communications |          |
|-----------------------|----------|
| Type:                 | Action:  |
| Information Request   | Create > |

- Enter your message for the Information Request. There is a basic spell-check that will identify spelling errors:

| Information Request                                                                                                                                                                                                                                                                                       |                |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Predicted Format:                                                                                                                                                                                                                                                                                         | Message Centre |
| <div> <span>↶</span> <span>↷</span> <span>B</span> <span>I</span> <span>U</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> </div> |                |
| <p>We have received your proof of disability, however, records indicate that you have not yet <u>registred</u> in any courses at our school.</p>                                                                                                                                                          |                |

4.  The name and general contact telephone number for your school will be automatically included in the final communication. You must key any customized information you want included, such as your name, direct telephone, or e-mail address.
5. There is a character counter in the lower left-hand corner of the screen, which updates as the message is created. The message entered cannot exceed 2000 characters:

| Information Request                                                                                                                                                                                                                                                         |                |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Predicted Format:                                                                                                                                                                                                                                                           | Message Centre |
| <div> <span>↶</span> <span>↷</span> <span>B</span> <span>I</span> <span>U</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> </div> |                |
| <p>We have received your proof of disability, however, records indicate that you have not yet registered in any courses at our school.</p>                                                                                                                                  |                |
| <p>131 OF 2000 CHARACTERS</p>                                                                                                                                                                                                                                               |                |

6. If the **Predicted Format** for the student's communication is **Message Centre**, the following optional features will also be available:
  - **Insert hyperlink:** This feature can be used to include an external hyperlink within the message (e.g., a link to the OSAP website):

| Information Request                                                                                                                                                                                                                                                         |                |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Predicted Format:                                                                                                                                                                                                                                                           | Message Centre |
| <div> <span>↶</span> <span>↷</span> <span>B</span> <span>I</span> <span>U</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> <span>≡</span> </div> |                |
| <p> </p>                                                                                          |                |

To insert a hyperlink, highlight existing text then select the Insert/edit link button from the toolbar to present the link options then paste the desired link in the URL field and click Save.

Insert/Edit Link

✕

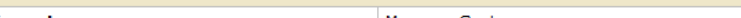
URL

Text to display

Title

Cancel

Save

| Information Request                                                                                                                                                                                                                                                                                                                                                                                                                |                |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|
| Predicted Format:                                                                                                                                                                                                                                                                                                                                                                                                                  | Message Centre |
| <div></div> <p>In order to have your Academic Probation reviewed, you must submit a completed <a href="#">2022-23 OSAP Acknowledgement of Academic Probation</a> form. This form and all required documents must be received by your financial aid office or the ministry no later than 40 days before the end of your 2022-23 study period.</p> |                |



 In the **Insert/Edit Link** window above, the optional Title field can be used to provide supplementary information to the student. Any text entered in this field will display when a cursor hovers over the link; however, the field should not be relied upon as the content will not be accessible to certain users (e.g., mobile/tablet users, or those navigating with a keyboard only).

- Message Link:** This feature lets you communicate and include a link to CIFS only. To use the feature, choose the CIFS link if it corresponds to your message from the **Message Link** dropdown in the ***Additional Options*** section:

POWERED BY TINY

Additional Options

Message Link

Select Option

Select Option

CIFS

Once the message is composed, select Submit. The IR will show a status of Requested and will be available in the student's Message Centre the following day.

|                                   |                 |            |                | REQUEST COMMUNICATION > | VIEW AUDIT >                 |
|-----------------------------------|-----------------|------------|----------------|-------------------------|------------------------------|
| Student Communications History    |                 |            |                |                         |                              |
| Communication:                    | Date Requested: | Date Sent: | Format:        | Status:                 | Actions:                     |
| Profile FAO Information Request 2 | Nov 30/2022     |            | Message Centre | Requested               | View ><br>Edit ><br>Cancel > |

Until the IR has been sent, the message content can be edited as needed using the Edit link on the **Student Communications History** screen.

|                                   |                 |            |                | REQUEST COMMUNICATION > | VIEW AUDIT >                 |
|-----------------------------------|-----------------|------------|----------------|-------------------------|------------------------------|
| Student Communications History    |                 |            |                |                         |                              |
| Communication:                    | Date Requested: | Date Sent: | Format:        | Status:                 | Actions:                     |
| Profile FAO Information Request 2 | Nov 30/2022     |            | Message Centre | Requested               | View ><br>Edit ><br>Cancel > |

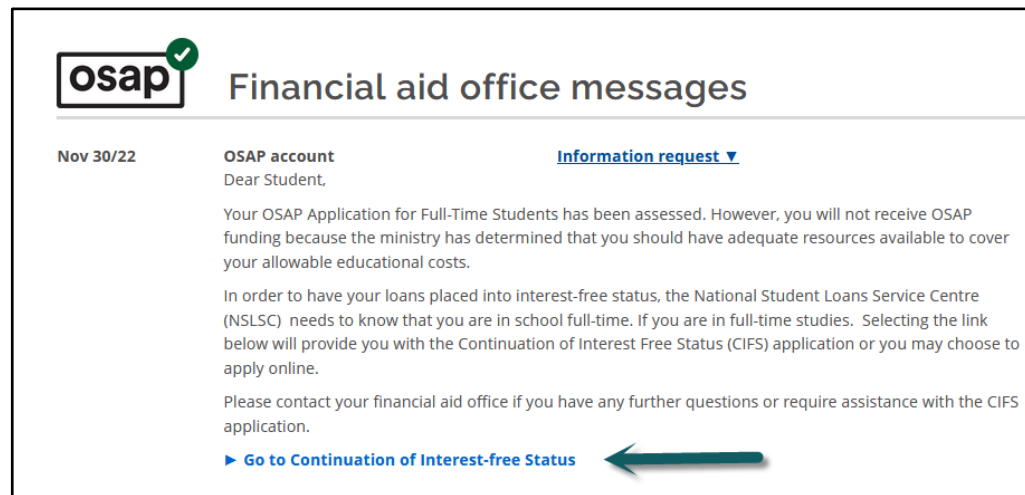
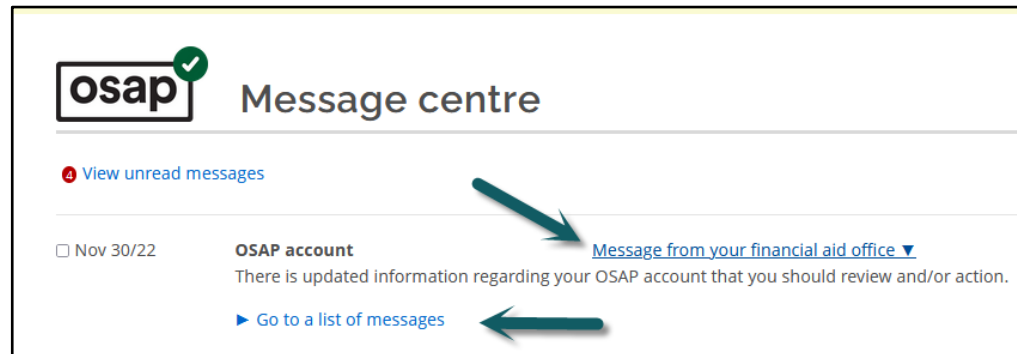
Any changes made to either the body of the message or the attachment(s) will be reflected within the student communications audit. This includes any re-issue requests, Information Requests created, as well as the cancellation of either of those two items prior to the nightly communications run

| Student Communication Audit |                                 |               |                  |                           |
|-----------------------------|---------------------------------|---------------|------------------|---------------------------|
| Date and Time:              | Communication:                  | Before Value: | After Value:     | User ID:                  |
| Nov 30/2022<br>11:01 AM     | Profile FAO Information Request |               | Changed - VIEW > | User Guide<br>Demo (EUAL) |
| Nov 30/2022<br>10:45 AM     | Profile FAO Information Request |               | Requested        | User Guide<br>Demo (EUAL) |

Select **VIEW** to see the before and after values:

| Before Value:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | After Value:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Dear Student,<br>Your OSAP Application for Full-Time Students has been assessed. However, you will not receive OSAP funding because the ministry has determined that you should have adequate resources available to cover your allowable educational costs. In order to have your loans placed into interest-free status, the National Student Loans Service Centre (NSLSC) needs to know that you are in school full-time. If you are in full-time studies. Selecting the link below will provide you with the Continuation of Interest Free Status application or you may choose to apply online. | Dear Student,<br>Your OSAP Application for Full-Time Students has been assessed. However, you will not receive OSAP funding because the ministry has determined that you should have adequate resources available to cover your allowable educational costs. In order to have your loans placed into interest-free status, the National Student Loans Service Centre (NSLSC) needs to know that you are in school full-time. If you are in full-time studies. Selecting the link below will provide you with the Continuation of Interest Free Status (CIFS) application or you may choose to apply online. Please contact your financial aid office if you have any further questions or require assistance with the CIFS application. |

## Reference: Corresponding Student's View of Profile FAO Information Request



 Note: Although the “Add Attachment” function for FAA/FAO Information Requests are now available through the 2022-23 full-time and part-time applications, this functionality is not currently available for Information Requests sent at the Student Profile level.

## Cancelling an Information Request

An Information Request can be cancelled at any point prior to the nightly communications run.

1. Click **Cancel** corresponding to the IR to be cancelled.
2. A pop-up message will appear asking you to confirm the cancelation. To proceed, click **OK**.
3. The status of the Information Request will now display as Cancelled on the **Student Communication History**:

|                                   |                 |            |                | REQUEST COMMUNICATION > | VIEW AUDIT >                                                                        |
|-----------------------------------|-----------------|------------|----------------|-------------------------|-------------------------------------------------------------------------------------|
| Student Communications History    |                 |            |                |                         |                                                                                     |
| Communication:                    | Date Requested: | Date Sent: | Format:        | Status:                 | Actions:                                                                            |
| Profile FAO Information Request 3 | Nov 30/2022     |            | Message Centre | Cancelled               |  |

## Enter Applications

The **Enter Application** link on the left navigation bar takes you directly to the screen to start the paper application entry process.

The student's details, including their name, SIN and OAN, will be pre-filled on **Enter Application** based on direct access to this functionality from within the student's profile.

## Reset Password (and OAN Retrieval)

The **Reset Password** link on the left navigation bar takes you directly to **Student Password Reset & OAN Retrieval** screen.

The student's details, including their name and OAN, will be pre-filled on this screen because you accessed it directly from the student's profile.



Before resetting the student's password and/or providing them with their OAN, you must [verify the student's identity](#). Do this by checking the documentation they present to you in a face-to-face meeting or by videoconference.



The password reset and/or OAN retrieval process can only be done between you and the student. It does **not** include providing a temporary password or retrieving an OAN to the authorized individual.

## What is Required to Verifying the Student's Identity

The student must present two types of documents to verify their identity before the password reset and/or OAN retrieval process can proceed:

- Proof of their Social Insurance Number
- Valid government-issued photo id

"Valid" means the documents presented must be:

- The original document (not a photocopy).
- Current (not expired).
- Include a signature (only if it required as part of the document).

### **Examples: Acceptable Proof of SIN Documents**

- SIN card.
- A Government of Canada document that contains the student's complete SIN.
- A letter from Service Canada that contains the student's complete SIN.

### **Examples: Acceptable Government-Issued Photo ID**

- Valid photo ID issued by the Government of Canada. Examples: passport, Permanent Resident card.
- Valid photo ID issued by any Canadian provincial or territorial government. Examples: driver's licence, Ontario Photo Card

### **How to Verify the Student's Identity**

To verify the student's identity:

- Compare the first and last name on the documents presented to the information displayed on screen.
- Verify that the person providing the documentation is the same person in the government-issued photo ID.



Do **not** record any identifying details or take photocopies of the documentation viewed. Once you have completed viewing the documents return them to the student.

### **Completing the OAN Retrieval Process**

Write the OAN on a separate sheet of paper and provide it to the student.



Do **not** print the screen as it includes both the student's name and Social Insurance Number.

### **Completing the Password Reset Process**

1. Click **Reset Password** on **Student Information**.
2. A pop-up window will present. The message states that by clicking OK you are acknowledging you have validated the student's identity as outlined for the password reset criteria. To proceed click **OK**.
3. **Temporary Password Details** will display the student's temporary password. The temporary password is:
  - Comprised of both numbers and letters.

- Case-sensitive.
4. Write the password down exactly as shown or print the screen for the student. The screen does not have any other identifying details for the student.

The temporary password expires when one of the conditions is met:

- Once the student successfully logs into their OSAP account and creates a new password, or
- When a new temporary password is generated by any means, or
- After 30 days from the temporary password being generated.

## Student Profile Comments

### Overview

The **Student Profile Comments** link on the left navigation bar takes you directly to **Student Profile Comments**.

**Student Profile Comments** allows you to view and add comments to the student's profile.

### Profile Comment Alert

**Student Summary** will display a linked alert if comments exist on the student's profile.

| Student Summary                                                                   |  |  |                    |
|-----------------------------------------------------------------------------------|--|--|--------------------|
| Student Information                                                               |  |  | Action:            |
| Name:                                                                             |  |  | ACADEMIC SUMMARY > |
| SIN:                                                                              |  |  |                    |
| OAN:                                                                              |  |  |                    |
| OEN:                                                                              |  |  |                    |
| <ul style="list-style-type: none"> <li>• Profile <b>Comments</b> Exist</li> </ul> |  |  |                    |

One or more comments assigned high importance are presented on **Student Summary** as **Important Profile Comments Exist**.

|                                                                                             |  |  |                    |
|---------------------------------------------------------------------------------------------|--|--|--------------------|
| Student Information                                                                         |  |  | Action:            |
| Name:                                                                                       |  |  | ACADEMIC SUMMARY > |
| SIN:                                                                                        |  |  |                    |
| OAN:                                                                                        |  |  |                    |
| OEN:                                                                                        |  |  |                    |
| <ul style="list-style-type: none"> <li>• Important Profile <b>Comments</b> Exist</li> </ul> |  |  |                    |
| Application(s)                                                                              |  |  |                    |

In both instances, the word "**Comments**" contains a link that takes you directly to **Student Profile Comments**.

## Viewing Profile Comments

The default presentation for **Student Profile Comments** includes the following:

- Date and time the comment was added.
- The topic of the comment.
- The comment's subject line.
- The name of the person who entered the comment.
- An action link to view the comment details.

| < Expand All > < Collapse All >     |         |                                |                           |                           |
|-------------------------------------|---------|--------------------------------|---------------------------|---------------------------|
| ADD COMMENT > VIEW AS400 COMMENTS > |         |                                |                           |                           |
| Student Profile Comments            |         |                                |                           |                           |
| Date/Time:                          | Topic:  | Subject:                       | User:                     | Actions:                  |
| Nov 28/2022<br>01:23 PM             | General | Name change Requested in Error | User Guide<br>Demo (EUAL) | <a href="#">VIEW &gt;</a> |

Click **View** to reveal the body of the comment. Doing so will also present two actions specific to the comment:

- **Raise Severity** (or **Lower Severity**): used to [adjust the level of importance](#) assigned to the comment.
- **View Audit**

| < Expand All > < Collapse All >                                                                              |         |                                |                           |                                                                        |
|--------------------------------------------------------------------------------------------------------------|---------|--------------------------------|---------------------------|------------------------------------------------------------------------|
| ADD COMMENT > VIEW AS400 COMMENTS >                                                                          |         |                                |                           |                                                                        |
| Student Profile Comments                                                                                     |         |                                |                           |                                                                        |
| Date/Time:                                                                                                   | Topic:  | Subject:                       | User:                     | Actions:                                                               |
| Nov 28/2022<br>01:23 PM                                                                                      | General | Name change Requested in Error | User Guide<br>Demo (EUAL) | <a href="#">VIEW v</a>                                                 |
| Student came into the office today. They clicked the name change box in error. Please disregard the request. |         |                                |                           | <a href="#">RAISE SEVERITY &gt;</a><br><a href="#">VIEW AUDIT &gt;</a> |

## Raise Severity/Lower Severity

The text presented will be the opposite of the current severity assigned to the comment:

- **Raise Severity** will display for a comment currently assigned the Standard severity.
- **Lower Severity** will display for a comment currently assigned high importance.

Click on the link to change the severity as required.

## Profile Comment Audit

Click **View Audit** to access the audit history specific to that comment.

| <a href="#">&lt; Expand All &gt;</a> <a href="#">&lt; Collapse All &gt;</a>                                  |         |                                |                           |                                                                        |
|--------------------------------------------------------------------------------------------------------------|---------|--------------------------------|---------------------------|------------------------------------------------------------------------|
| <a href="#">ADD COMMENT &gt;</a> <a href="#">VIEW AS400 COMMENTS &gt;</a>                                    |         |                                |                           |                                                                        |
| Student Profile Comments                                                                                     |         |                                |                           |                                                                        |
| Date/Time:                                                                                                   | Topic:  | Subject:                       | User:                     | Actions:                                                               |
| Nov 28/2022<br>01:23 PM                                                                                      | General | Name change Requested in Error | User Guide<br>Demo (EUAL) | <a href="#">VIEW</a>                                                   |
| Student came into the office today. They clicked the name change box in error. Please disregard the request. |         |                                |                           | <a href="#">RAISE SEVERITY &gt;</a><br><a href="#">VIEW AUDIT &gt;</a> |

**Profile Comment Audit** will include the date and time the comment was created as well as the name of the user that entered the comment. Any changes to the comment's severity are also listed.

| Profile Comment Audit  |               |               |              |                           |
|------------------------|---------------|---------------|--------------|---------------------------|
| Date and Time: ▼       | Field Name: ▲ | Before Value: | After Value: | User:                     |
| Nov 28/2022<br>1:30 PM | Severity      | High          | Standard     | User Guide<br>Demo (EUAL) |
| Nov 28/2022<br>1:30 PM | Severity      | Standard      | High         | User Guide<br>Demo (EUAL) |
| Nov 28/2022<br>1:23 PM | Comment       |               | Created      | User Guide<br>Demo (EUAL) |

## Adding a Profile Comment

Only add comments related to profile details. Comments specific to a funding application should be entered in the student's application account.



Comment must include statements of facts only. Any comment added to the student's profile will be released as part of an access to information (FOI) request.

- From the top of **Student Profile Comments**, click **Add Comment**.

| <a href="#">&lt; Expand All &gt;</a> <a href="#">&lt; Collapse All &gt;</a> |  |  |  |  |
|-----------------------------------------------------------------------------|--|--|--|--|
| <a href="#">ADD COMMENT &gt;</a> <a href="#">VIEW AS400 COMMENTS &gt;</a>   |  |  |  |  |
| Student Profile Comments                                                    |  |  |  |  |

- From **Add Profile Comment**, select the description in the **Topic** dropdown list that best describes the basis of the comment.

| Add Profile Comment                                     |                                                                                                        |            |  |  |
|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------|------------|--|--|
| Date:                                                   | Topic:                                                                                                 | Severity:  |  |  |
| Nov 28/2022                                             | General ▼                                                                                              | Standard ▼ |  |  |
| Subject:                                                | <div> General<br/> Profile Doc<br/> SIR<br/> Profile Change<br/> Restriction<br/> Communication </div> |            |  |  |
| <div>0 of 800 Characters</div>                          |                                                                                                        |            |  |  |
| <a href="#">CANCEL &gt;</a> <a href="#">SUBMIT &gt;</a> |                                                                                                        |            |  |  |

3. Select the **Severity** (importance) you would like to assign the comment. Your options are:
  - Standard (this is the typical severity to assign)
  - High (use this to flag an important comment)

| Add Profile Comment |                                                                                                                                                                                                  |            |
|---------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Date:               | Topic:                                                                                                                                                                                           | Severity:  |
| Nov 28/2022         | General ▼                                                                                                                                                                                        | Standard ▼ |
| Subject:            | <div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">Standard</div> <div style="background-color: #f0f0f0; padding: 2px;">High</div> </div> |            |

4. Enter the **Subject Line** text. Be concise since the default presentation on **Student Profile Comments** shows the subject line only. Others will use this information to determine whether they need to view the full comment.
5. Enter the body of the **Comment**. Your comment can be up to 800 characters in length.
6. Review the information keyed. Click **Submit** once you are satisfied the information entered.



Once you submit a comment, you cannot edit or delete it. Only defined ministry staff have the authority to do so.

## Student Hold

### Overview

Student Hold function is available to allow the ministry to stop the processing of student applications for a specified period of time. OSAP applications (Full-Time, Part-Time, or Micro-credentials) starting in 2020-21 and subsequent academic years will be held if the study period falls within the specified period.

Any application that is placed on hold as a result of a student hold will not continue to process. The student will not be eligible for additional funding until the student hold period elapses. If a student hold elapses mid-way through an OSAP study period, the applicant will not be eligible for additional funding consideration until the next logical break in study after the student hold period has ended.

This functionality is restricted to ministry access only, however institutions will be able to view the details of any student hold that is placed on a file.

### Student Hold Details

The “Student Hold” function can be accessed through the Student Profile, under the “Administrative Functions” section in the left navigation bar.

The screenshot shows the 'Student Profile' page. On the left, the 'Administrative Functions' section is expanded, and 'Student Hold' is highlighted with a green arrow. The main content area shows the 'Student Summary' section with fields for Name, SIN, OAN, and OEN. Below this, there is a section for 'Application(s)' with a table showing the following data:

| Application(s) | Action:                                   |
|----------------|-------------------------------------------|
| CoreFT ▼       |                                           |
| 2022-2023      | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
| 2021-2022      | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |
| CorePT ▼       |                                           |
| 2021-2022      | WORK WITH ><br>VIEW FAO STUDENT INQUIRY > |

From within this screen, users will be able to view the details of any student hold placed on the student account.

The screenshot shows the 'Student Hold' page. On the left, the 'Student Hold' option is highlighted. The main content area shows the 'Student Hold' section with fields for Name, SIN, OAN, and OEN. Below this, there is a section for 'Student Hold' with a table showing the following data:

| Hold Period:                           | Impacted FI's:     | Action: |
|----------------------------------------|--------------------|---------|
| September 15, 2021 - February 03, 2022 | Core-FT<br>Core-PT |         |
| October 05, 2022 - February 01, 2023   | Core-FT<br>Core-PT |         |

**Hold Period:** The start and end date of the student hold period will be displayed here. Impacted OSAP applications for the 2020-21 and subsequent academic years that overlap with this period will immediately be placed on a full hold (E.g., from the above screenshot, applications with study period start or end dates that overlap September 15, 2021, through February 3, 2022, or October 5, 2022 to February 1, 2023 will be placed on hold)

**Impacted FI's:** The ministry is able to place a student hold that will impact full-time OSAP eligibility (Core-FT), part-time OSAP eligibility (Core-PT), or Micro-credentials (Core-MC) or all FI's. The Impacted FI's that are displayed indicate which OSAP program has been impacted by the student hold (e.g., from the above screenshot, both Core-FT and Core-PT funding have been placed on hold).

## Student Hold: View Within an Application

Any OSAP application that falls within a student hold period will immediately be placed on hold. The student hold details can be accessed from the **Student Profile**, the **Processing Summary** or through the **Application/Student Hold** link that appears on the left navigation bar within any full-time, part-time, or micro-credential application.

| Work with Application    |                                                                          | Processing Summary - 2022-2023                                                                   |                                 |             |                           |
|--------------------------|--------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|---------------------------------|-------------|---------------------------|
| Processing Summary       | Student SIN: <input type="text"/>                                        | Student No:                                                                                      | Action:                         |             |                           |
| Application Details      | Name (Last, First): <input type="text"/>                                 | Account Number:                                                                                  | VIEW STUDENT PROFILE >          |             |                           |
| Third Party Details      | Master status: Open                                                      | Processing status: <b>Restrictions</b>                                                           | VIEW STUDENT SUMMARY >          |             |                           |
| Program Information      | Institution: EUAL - LAKEHEAD UNIVERSITY                                  | Study Period(s): August 19, 2022 - August 15, 2023 (51 weeks)                                    | VIEW ALL CORE-FT APPLICATIONS > |             |                           |
| Supporting Documentation | Student Status: F: Single Independent<br>P: Single Independent (2 Years) |                                                                                                  |                                 |             |                           |
| Assessment               |                                                                          |                                                                                                  |                                 |             |                           |
| Distribution             |                                                                          |                                                                                                  |                                 |             |                           |
| Administrative Functions |                                                                          | <a href="#">RE-RUN EVENTS &gt;</a> <a href="#">SHOW ALL &gt;</a> <a href="#">VIEW AUDIT &gt;</a> |                                 |             |                           |
| Open/Close Application   | Processing Summary                                                       |                                                                                                  |                                 |             |                           |
| Reviews                  | Processing Step:                                                         | Description:                                                                                     | Date:                           | Status:     | Action:                   |
| Third Party Overrides    | 1                                                                        | Requirements for Assessment                                                                      | Mar 3, 2022                     | Incomplete  | <a href="#">DETAILS</a>   |
| Application/Student Hold | 2                                                                        | Assessment                                                                                       | Mar 2, 2022                     | On Hold     | <a href="#">VIEW &gt;</a> |
| Communications           | 3                                                                        | Disbursement of Funds                                                                            |                                 | Not Started | <a href="#">DETAILS</a>   |
| Add Study Period         |                                                                          | Supporting Documentation                                                                         | Mar 1, 2022                     | Incomplete  | <a href="#">VIEW &gt;</a> |
| Application Comments     |                                                                          |                                                                                                  |                                 |             |                           |
| Application Inquiry      |                                                                          |                                                                                                  |                                 |             |                           |
| OSAP FT Functions        |                                                                          |                                                                                                  |                                 |             |                           |

The “Application/Student Hold” details will display any existing application holds as well as student holds that are impacting the application.

| Work with Application    |                                                                          | Application/Student Hold - 2022-2023                          |                                 |                                        |  |
|--------------------------|--------------------------------------------------------------------------|---------------------------------------------------------------|---------------------------------|----------------------------------------|--|
| Processing Summary       | Student SIN: <input type="text"/>                                        | Student No:                                                   | Action:                         |                                        |  |
| Application Details      | Name (Last, First): <input type="text"/>                                 | Account Number:                                               | VIEW STUDENT PROFILE >          |                                        |  |
| Third Party Details      | Master status: Open                                                      | Processing status: <b>Restrictions</b>                        | VIEW STUDENT SUMMARY >          |                                        |  |
| Program Information      | Institution: EUAL - LAKEHEAD UNIVERSITY                                  | Study Period(s): August 19, 2022 - August 15, 2023 (51 weeks) | VIEW ALL CORE-FT APPLICATIONS > |                                        |  |
| Supporting Documentation | Student Status: F: Single Independent<br>P: Single Independent (2 Years) |                                                               |                                 |                                        |  |
| Assessment               |                                                                          |                                                               |                                 |                                        |  |
| Distribution             |                                                                          |                                                               |                                 |                                        |  |
| Administrative Functions |                                                                          | <a href="#">ADD &gt;</a> <a href="#">VIEW AUDIT &gt;</a>      |                                 |                                        |  |
| Open/Close Application   | Application Hold                                                         |                                                               |                                 |                                        |  |
| Reviews                  | Hold Type:                                                               | Action:                                                       |                                 |                                        |  |
| Third Party Overrides    | No hold for this application                                             |                                                               |                                 |                                        |  |
| Application/Student Hold | Student Hold                                                             |                                                               |                                 |                                        |  |
| Communications           | Start Date:                                                              | End Date:                                                     | Status:                         | Action:                                |  |
| Add Study Period         | Oct 5, 2022                                                              | Feb 1, 2023                                                   | Active                          | <a href="#">VIEW STUDENT HOLD &gt;</a> |  |
| Application Comments     |                                                                          |                                                               |                                 |                                        |  |
| Application Inquiry      |                                                                          |                                                               |                                 |                                        |  |
| OSAP FT Functions        |                                                                          |                                                               |                                 |                                        |  |
| References               |                                                                          |                                                               |                                 |                                        |  |
| Help                     |                                                                          |                                                               |                                 |                                        |  |

When a student hold has been placed on an account, the details outlining the decision will be included as a profile comment on the student's profile. Any questions regarding a student hold can be directed to [OSAPFAO.Inquiry@ontario.ca](mailto:OSAPFAO.Inquiry@ontario.ca).

## Appendices

### Appendix 1: Terms and Acronyms

| Term/Acronym                               | Description                                                                                                                                                                                               |
|--------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| AS/400                                     | The computer system previously used to process all OSAP applications and support systems. Also referred to as LOB (“line of business”) or “green screens”.                                                |
| BRS                                        | Bursary Recording System                                                                                                                                                                                  |
| CAS                                        | Children’s Aid Society                                                                                                                                                                                    |
| CIFS                                       | Continuation of Interest-Free Status                                                                                                                                                                      |
| COREFT/CORE-FT                             | Alternate term used to describe OSAP for Full-Time Students.                                                                                                                                              |
| COREMC                                     | Alternate term used to describe OSAP for Micro-credentials                                                                                                                                                |
| COREPT/CORE-PT                             | Alternate term used to describe OSAP for Part-Time Students.                                                                                                                                              |
| CSG-D                                      | Canada Student Grant for Persons with Disabilities                                                                                                                                                        |
| FAA, FAO                                   | Financial aid office and/or staff working in the financial aid office responsible for the administration of OSAP.                                                                                         |
| Funding application/<br>funding instrument | Generic reference to the OSAP grant or loan program applications. Examples: OSAP for Full-Time Students, OSAP for Part-Time Students, OSAP for Micro-credentials and Continuation of Interest-Free Status |
| Green screens                              | See AS/400.                                                                                                                                                                                               |
| LOB                                        | Line of Business. See AS/400.                                                                                                                                                                             |
| LOP                                        | Loan overpayment                                                                                                                                                                                          |
| OAN                                        | OSAP Access Number: A unique 9-digit number assigned to a user’s SIN when their student profile is created.                                                                                               |
| OEN                                        | Ontario Education Number: A unique 9-digit identifier assigned to students who have participated in the Ontario primary/second education system.                                                          |
| OSAP                                       | Ontario Student Assistance Program                                                                                                                                                                        |
| OSOG                                       | Ontario Student Opportunity Grant. A post-study grant program that was applied directly to the student’s outstanding loan debt. The last year of this program was in the 2016-17 academic year.           |

|                    |                                                                                                                                                                                                                                                                            |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| OTG/OSG-Base Terms | Possible alert on Student Summary. Stands for: 30% Ontario Tuition Grant/Ontario Study Grant. Both grants were provided to a maximum number of terms. This alert links to the term usage screen.<br>The last year for OTG was 2017-18.<br>The last year for OSG was 18-19. |
| PPD                | Persistent or prolonged disability                                                                                                                                                                                                                                         |
| RAFEO              | Régime d'aide financière aux étudiants de l'Ontario. This is the French translation of « OSAP ».                                                                                                                                                                           |
| SFAB               | Student Financial Assistance Branch                                                                                                                                                                                                                                        |
| SIN                | Social Insurance Number                                                                                                                                                                                                                                                    |
| SIR Check          | Social Insurance Registry check.                                                                                                                                                                                                                                           |
| Suppdocs           | Supporting document. Also referred to as required documents or required supporting documents.                                                                                                                                                                              |
| Third Party Check  | Verification by a trusted source of information provided by a student. Example: verification of SIN by the Social Insurance Registry.                                                                                                                                      |

## Appendix 2: Profile Supporting Documents

### Category 1 (Verification of Initial Information) Documents

| Code | Description                                       | Category | Reason Supporting Document is Generated                                                                        |
|------|---------------------------------------------------|----------|----------------------------------------------------------------------------------------------------------------|
| 013  | Proof of citizenship                              | 1        | Citizenship status = Permanent Resident                                                                        |
| 027  | Proof of birth date                               | 1        | Student is under 11 years of age based on birthdate provided                                                   |
| 043  | Proof of Persistent/Prolonged Disability          | 1        | Disability status = yes and<br>Is disability permanent = no and<br>Is disability persistent or prolonged = yes |
| 048  | Proof of permanent disability                     | 1        | Disability status = yes and<br>Is disability permanent = yes                                                   |
| 082  | Proof of status with Children's Aid Society (CAS) | 1        | Ever in permanent care of CAS or Child and Family Services Agency = yes                                        |
| 085  | Proof of Indigenous status                        | 1        | Indigenous status = yes                                                                                        |

### Category 2/BPI Change Supporting Documents

| Code | Description               | Category | Reason Supporting Document is Generated                      |
|------|---------------------------|----------|--------------------------------------------------------------|
| 028  | Name change               | 2        | Change to first and/or last name requested                   |
| 029  | Birth date change         | 2        | Change to birth date requested                               |
| 030  | Gender change             | 2        | Change to gender requested                                   |
| 031  | Disability status change  | 2        | Change to disability status requested                        |
| 032  | High school date change   | 2        | Change to last high school date requested                    |
| 081  | Citizenship status change | 2        | Change to citizenship status requested                       |
| 083  | CAS status change         | 2        | Change to status with CAS or Family Service Agency requested |

|     |                           |   |                                        |
|-----|---------------------------|---|----------------------------------------|
| 084 | Francophone status change | 2 | Change to Francophone status requested |
| 086 | Indigenous status change  | 2 | Change to Indigenous status requested  |