



Overseas Student Portal User Manual



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1. Login

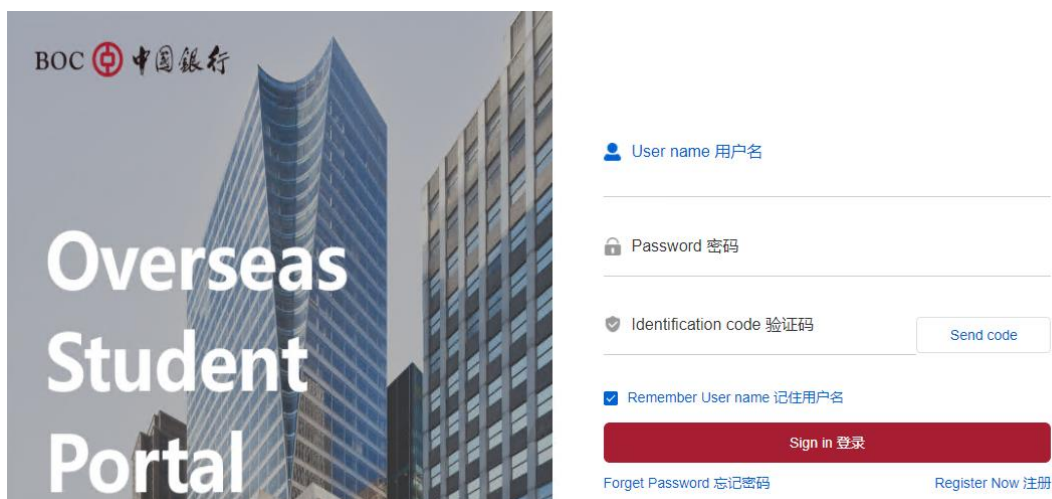
【Function introduction】

Overseas Student Portal users can log in and use functions of Overseas Student Portal by entering user name and password.

【Operating instructions】

◆ Login

- 1) Enter the login page. Please enter the email address that used in registered as your user name, and enter password correctly.
- 2) Receiving identification code. Click "**Send Code**" and a verification code will be sent to the designed email. You can also check "**Remember User username**" for faster login in the future.
- 3) Click "**Sign in**". If the user name, password, and verification code are correctly entered, users will log into the portal successfully.



Picture 1-1 Login page

2. Register

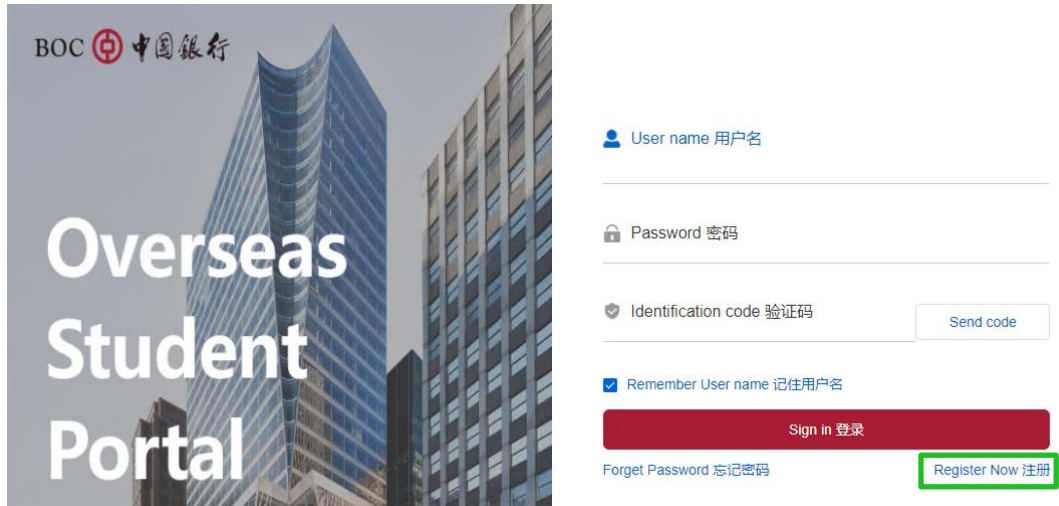
【Function introduction】

New users can register Overseas Student Portal account by themselves.

【Operating instructions】

◆ Register

- 1) New users can register the portal by clicking "**Register Now**" on the login page.



Picture 2-1 Registration

- 2) Users need to enter all the required information, including Last name, First name, Date of birth, etc., and set a password based on the password rule. Users must read and agree to the relevant disclosures first, and then click the box next to “I agree” to proceed to registration.



Register 注册

* Last name 姓

* First name 名

* Date of Birth 生日

* Mother's Maiden Name 母亲姓氏

* Password 密码

Password Help ▾

- At least 8 characters
- At least 2 of the following:
 - 1 letter (case sensitive)
 - 1 number
 - 1 of these special characters: ~!@#\$%^&* _ - + = | () [] ; ' > < . , ?
- No more than 2 identical or sequential characters (111, aaa, 123, abc, III)
- The password entered twice must be consistent
- The password cannot be the same as the user ID

* Confirm password 请再密码

* Email address 邮箱

Your email address will be your user name.
By providing your email address, you acknowledge you can receive and view email communications from BOC related to your application.
We will use your email to save and notify you of your application progress.

Important: In order to apply online, we must consent to receive notices and information about the service electronically. You must have the ability to receive and retain electronic communications and disclosures. By clicking the "I agree" box below, you consent to receive information electronically and agree to the terms and conditions set forth in the [E-Sign Disclosure and Consent Agreement](#) for this online service.

Important information about procedures for opening a new account or creating a new customer relationship with Bank of China U.S.A.
To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account or creates a new customer relationship with our bank. We will ask you for your name, date of birth and other information that will allow us to identify you.

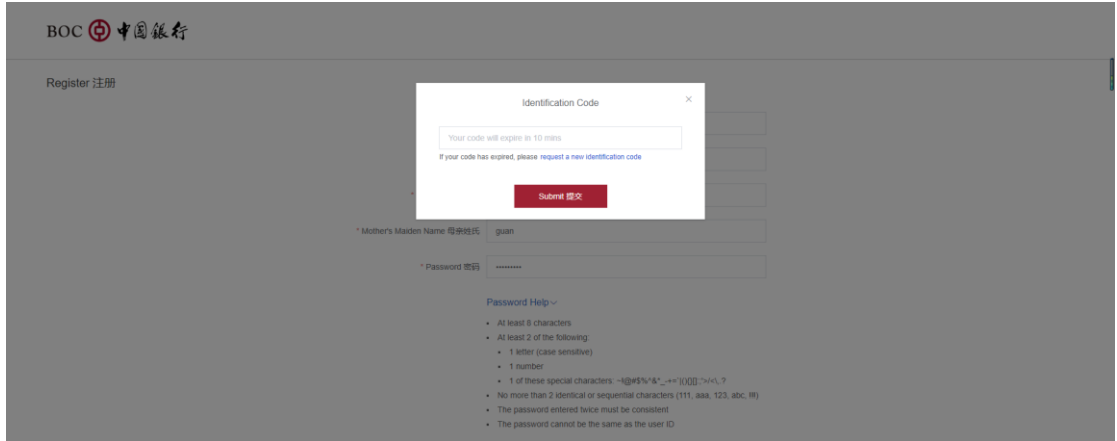
The Bank is required to conduct ongoing customer due diligence, and may request updated identifying information or certifications after your account relationship is established. Your account may be subject to certain restrictions or be closed after it is opened, based on our review of the information and documentation you submit to us.

Please note the application to open account with Bank of China U.S.A. is sent at your own request. We are committed to protecting your person information and privacy. By clicking "I agree" box, you also agree to our use of information and cookies, and agree to our [Terms and Conditions](#), [Privacy Policy](#) and [Disclaimer](#) for this online service.

I agree

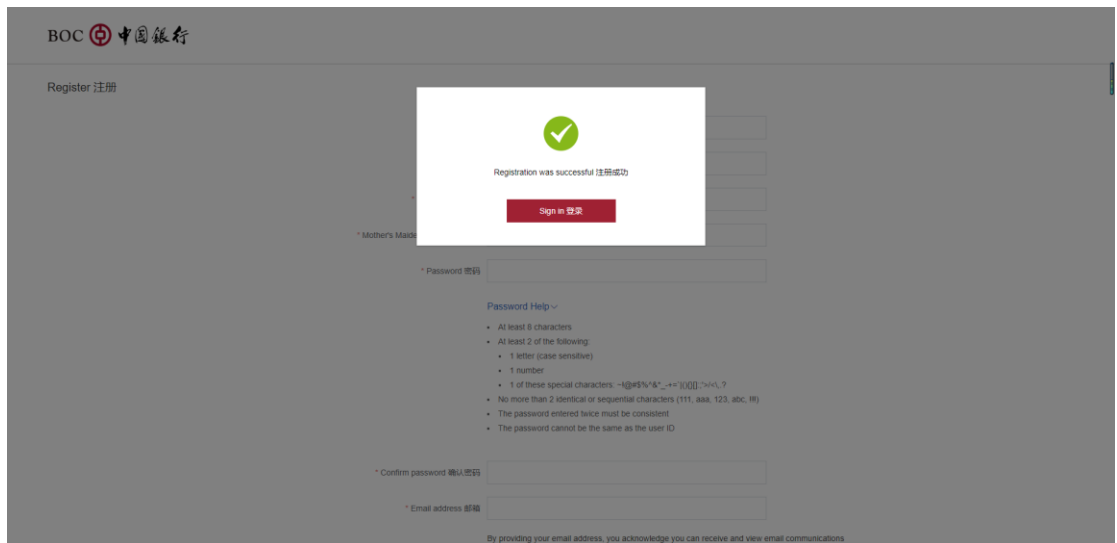
Picture 2-2 Registration-input information

- 3) After clicking "**Submit**", a verification code will be sent to the designed email. Enter verification code correctly and click the "**Submit**".



Picture 2-3 Registration- verification code

- 4) A window will popped up to inform that your registration is successful. Click "**Sign in**" jump to login page.



Picture 2-4 Registration- register successful

3. Forget Password

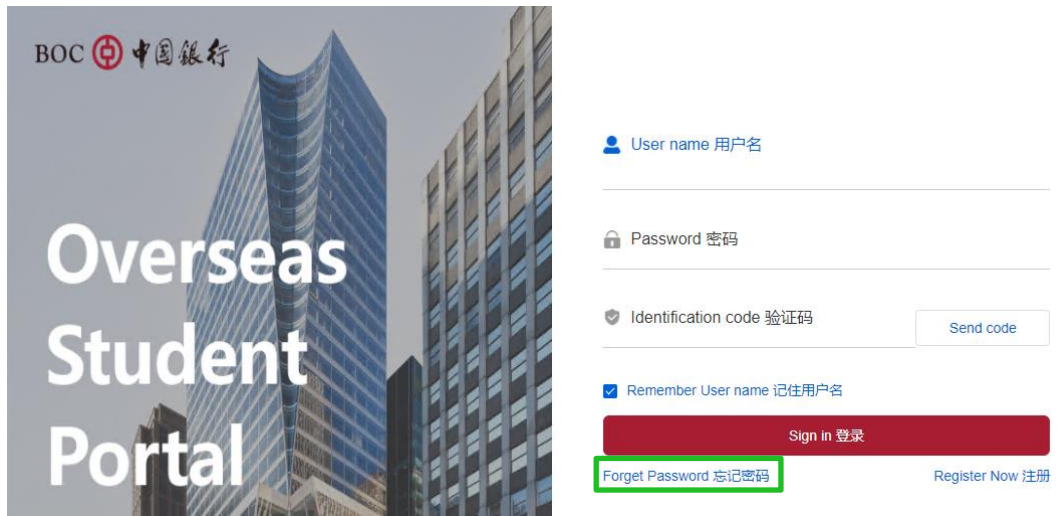
【Function introduction】

If user forgets the password, this function can be utilized to reset the password.

【Operating instructions】

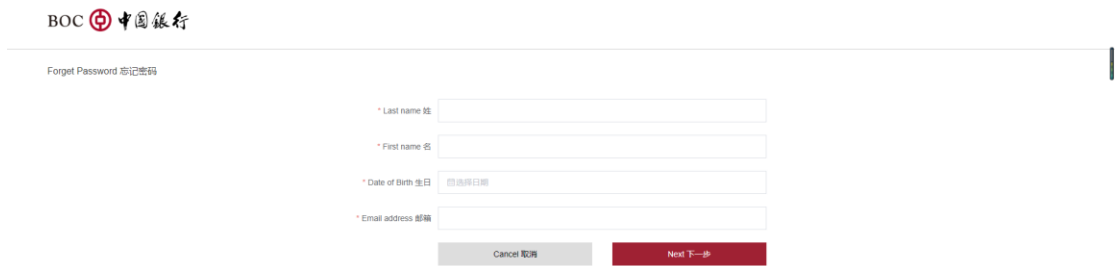
- ◆ Forget password

- 1) Enter the login page and click the "Forget password" to verify the identity.



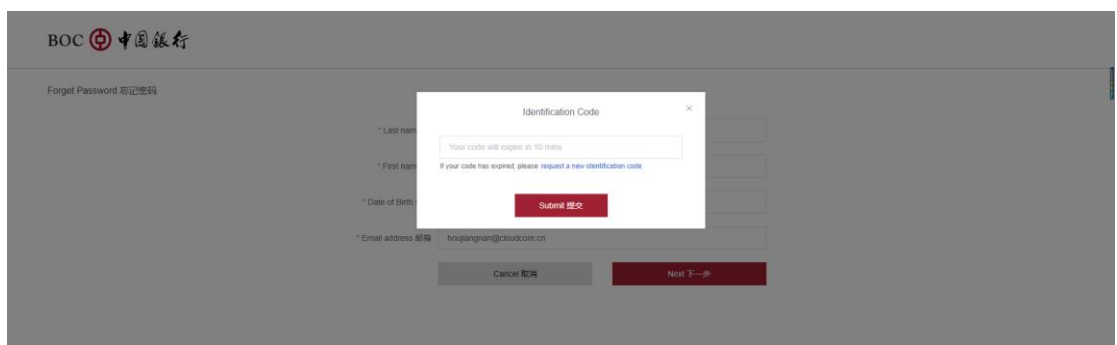
Picture 3-1 Forget password

- 2) Users need to input correct personal information, including Last name, First name, Date of birth, etc. to verify the identity in order to proceed to the next step.



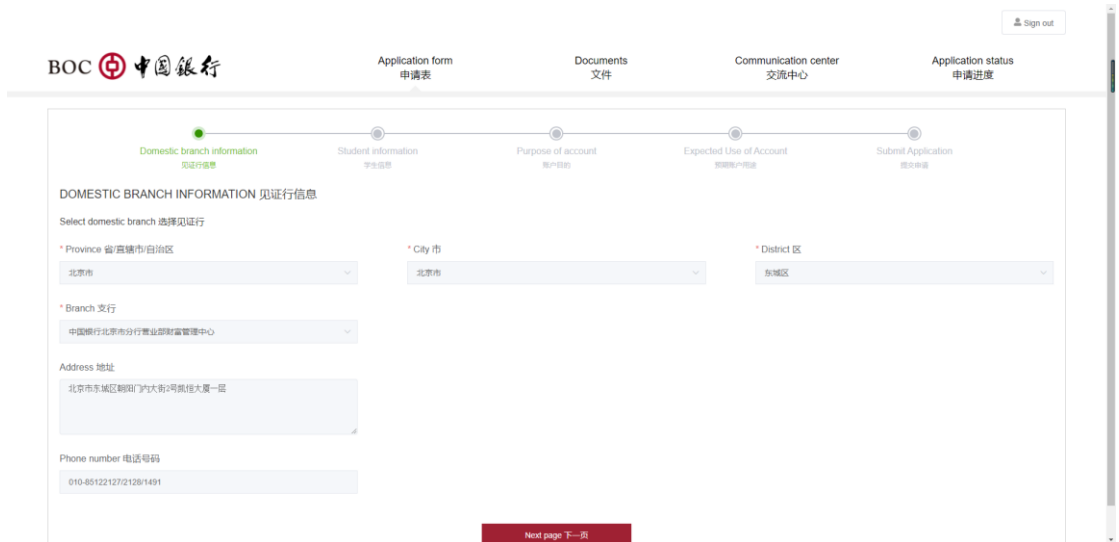
Picture 3-2 Forget password –verify identity

- 3) Verification process will be triggered and enter the verification code that sent to the designated email.



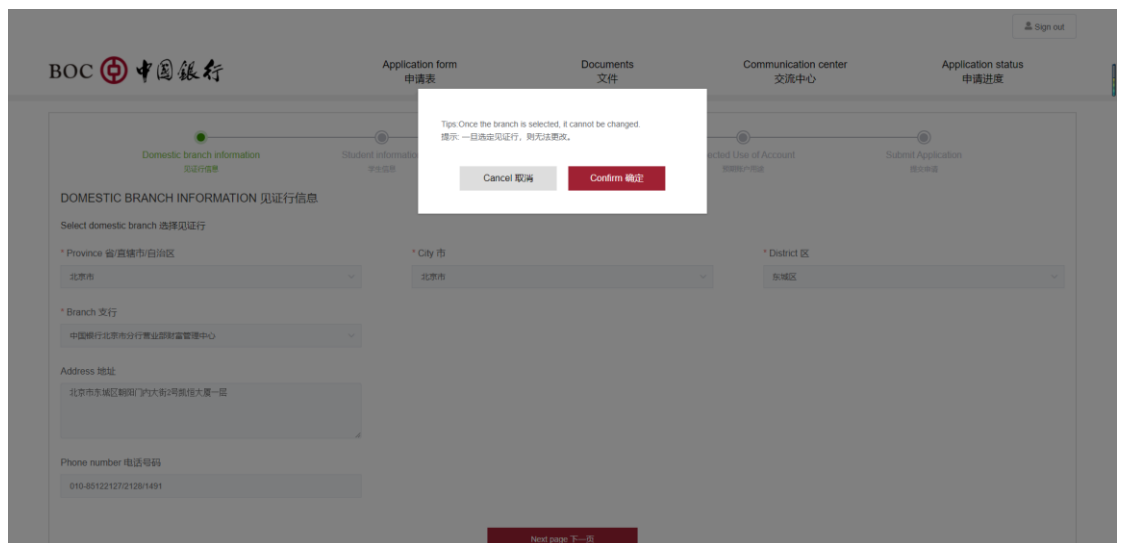
Picture 3-3 Forget password-verification code.

- 4) User can reset password according to the password rule and submit.



Picture 4-1 Application form- witness branch information.

- 2) Users can select a witness branch from the branch list that are location-convenient to do the witness service. Then click “**Confirm**” to the next page. Please note that the branch info cannot be edit once users confirm the selected branch.



Picture 4-2 Application form -Witness branch confirmation

- 3) Users need to enter the student’s information correctly and complete all the required fields in the “**Student information**” page, and click “**Next page**”.

[Sign out](#)

BOC 中国银行
Application form
申请表
Documents
文件
Communication center
交流中心
Application status
申请进度

Domestic branch information
国内行信息
Student information
学生信息
Purpose of account
账户目的
Expected Use of Account
预期账户用途
Submit Application
提交申请

STUDENT INFORMATION 学生信息

<p>* First Name 名</p> <input type="text" value=""/>	<p>* Last Name 姓</p> <input type="text" value=""/>	<p>* Title</p> <input type="text" value="MISS"/>
<p>* Date of Birth 出生日期</p> <input type="text" value="03/20/2000"/>	<p>* Occupation 职业</p> <input type="text" value="OVERSEAS STUDENTS"/>	<p>* Estimated Arrival Date 预计到达美国日期</p> <input type="text" value="05/21/2021"/>
<p>* Mother's Maiden Name 母亲姓氏</p> <input type="text" value="BAI"/>	<p>* Mail to 邮寄至</p> <input type="text" value="CHINESE BRANCH"/>	

Contact Information 联系方式

<p>Home Phone 家庭电话</p> <input type="text" value="05311111111"/>	<p>* Cell Phone 移动电话</p> <input type="text" value="1300008888"/>	<p>* Email Address 电子邮箱</p> <input type="text" value="3482816796@QQ.COM"/>
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ID Information 身份证信息

<p>* Passport Number 护照号码</p> <input type="text" value="EA1234567"/>	<p>* Issue Country/region 签发国家/地区</p> <input type="text" value="P. R. CHINA"/>	<p>* Issue Date 签发日期</p> <input type="text" value="03/01/2021"/>
<p>* Expiration Date 到期日</p> <input type="text" value="02/28/2025"/>	<p>* ID Number 证件号码</p> <input type="text" value="N1234567890"/>	<p>* Expiration Date 到期日</p> <input type="text" value="05/25/2025"/>
<p>* Secondary ID 次要证件</p> <input type="text" value="I-20"/>	<p>* ID Number 证件号码</p> <input type="text" value="620102200003201135"/>	<p>* Expiration Date 到期日</p> <input type="text" value="02/01/2025"/>

Home Information: (P.O. Box not acceptable) 家庭信息(不接受信箱地址)

* Home Address

<p>* Home Address Province 直辖市/省/自治区</p> <input type="text" value="GANSU"/>	<p>* Home Address City 市</p> <input type="text" value="LANZHOU"/>	<p>* Home Address Zip Code 邮编</p> <input type="text" value="730000"/>
<p>* Home Address Country/region 国家/地区</p> <input type="text" value="P. R. CHINA"/>		

U.S. School Information: (P.O. Box not acceptable) 美国学校信息(不接受信箱地址)

<p>* U.S. School Name 学校名称</p> <input type="text" value="GOOD UNIVERSITY"/>	<p>* U.S. School Phone 学校电话</p> <input type="text" value="1234567890"/>
<p>* School Address 学校地址</p> <input style="width: 100%;" type="text" value="111 DAXUE RD"/>	<p>* School Address City 城市</p> <input type="text" value="NEW YORK"/>
<p>* School Address Zip Code 邮编</p> <input type="text" value="10001"/>	<p>* School Address Country 国家</p> <input type="text" value="UNITED STATES"/>
<p>* School Address State 州</p> <input type="text" value="NY"/>	

Leave blank if the information is not available now, you need to provide the information through internet banking or contact us as soon as they become available. 以下项目内容若无可暂留空, 开户后若有更新请及时通过网上银行更新或其他方式通知我们行

<p>Social Security Number 社会安全号</p> <input type="text" value="123"/> - <input type="text" value="12"/> - <input type="text" value="1212"/>	<p>U.S. Cell Phone 手机</p> <input type="text" value="1234567890"/>
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Has U.S. Address 美国地址 ON

<p>* U.S. Address 地址</p> <input style="width: 100%;" type="text" value="101 SUSHE RD"/>	<p>* U.S. Address City 城市</p> <input type="text" value="NEW YORK"/>	<p>* U.S. Address State 州</p> <input type="text" value="NY"/>
<p>* U.S. Address Zip Code 邮编</p> <input type="text" value="10001"/>	<p>* U.S. Address Country 地址</p> <input type="text" value="UNITED STATES"/>	

Picture 4-3 Application form-student information

- 4) Users need to enter the account purpose correctly and complete all the required fields in the “Purpose of account” page, and click “Next page”.

The screenshot shows the 'Purpose of account' step in the BOC application process. The page title is 'PURPOSE OF ACCOUNT 账户目的'. It includes a progress bar at the top with five steps: Domestic branch information, Student information, Purpose of account, Expected Use of Account, and Submit Application. The 'Purpose of account' step is currently active. Below the title, there are instructions to select the purpose of account and a form with several fields: 'Savings', 'Daily Expense', 'Tuition', 'Remittance', and 'Other'. The 'Remittance' option is selected, and the 'TO' and 'FROM' fields are filled with 'TO' and 'FROM' respectively. Below this, there are sections for 'Financial Supporter Information' and 'Additional Financial Supporter Information', each with fields for name, occupation, annual income, relationship, and date of birth. At the bottom, there are 'Previous step' and 'Next page' buttons, and a 'Save' button.

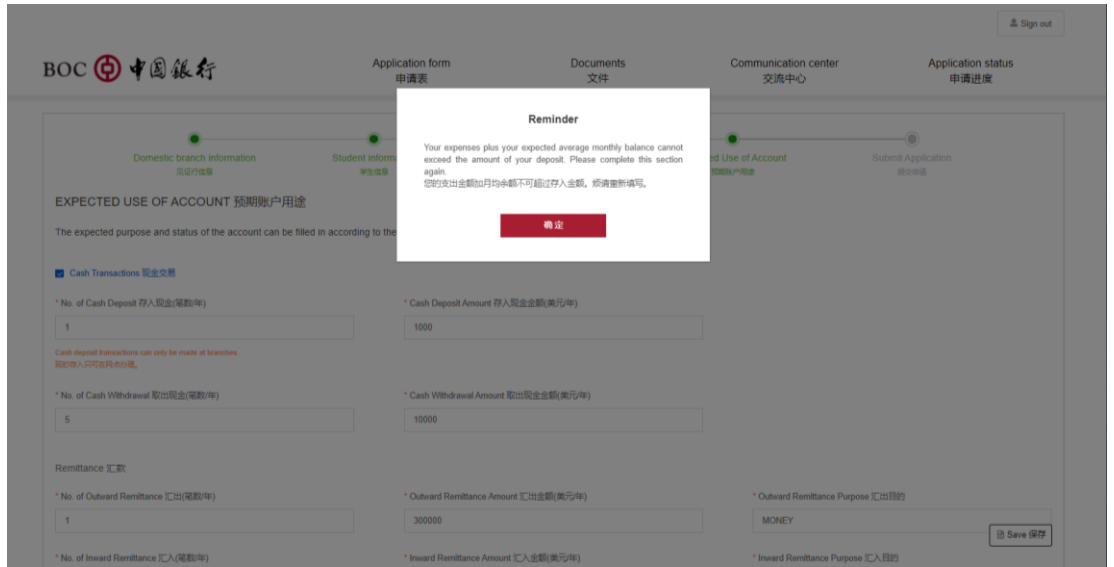
Picture 4-4 Application form-purpose of account

- 5) No account usage checked by default in the “**Expected account usage**” page. Users can check the aimed usage based on their purposes and input the relevant information. Click “**Submit**” to the next step.

The screenshot shows the 'Expected use of account' step in the BOC application process. The page title is 'EXPECTED USE OF ACCOUNT 预期账户用途'. It includes a progress bar at the top with five steps: Domestic branch information, Student information, Purpose of account, Expected Use of Account, and Submit Application. The 'Expected Use of Account' step is currently active. Below the title, there are instructions to fill in the expected purpose and status of the account. The form is divided into several sections: 'Cash Transactions', 'Cash Deposit Amount', 'Cash Withdrawal Amount', 'Remittance', and 'Others'. Each section has input fields for various details. At the bottom, there are 'Previous step' and 'Submit' buttons, and a 'Save' button.

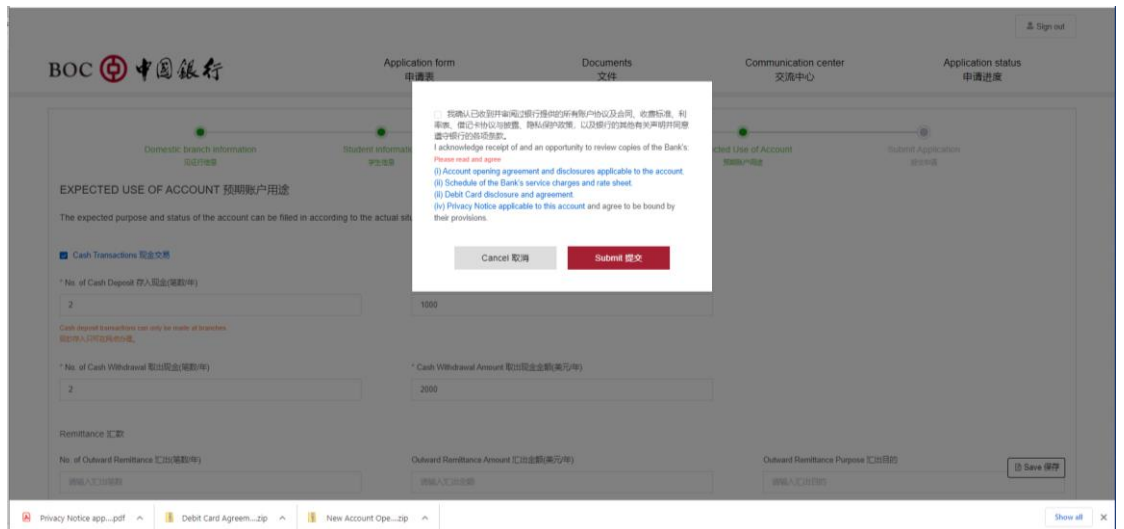
Picture 4-5 Application form-expected use of account

- 6) Please note that Cash deposit transactions can only be made at branches. And the expenses plus the expected average monthly balance cannot exceed the amount of deposit. Then click “**Submit**”.



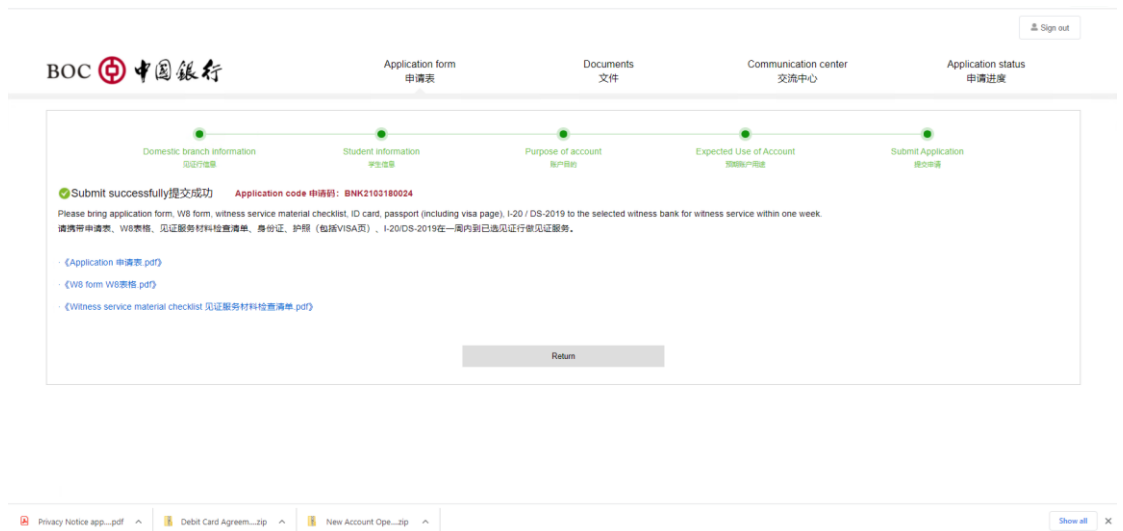
Picture 4-6 Expected use of account - Reminder

- 7) Users must read and agree to the relevant terms and disclosures first to proceed the application request. Click “**Submit**”.



Picture 4-7 Application form- terms and disclosure

- 8) Application code will be generated and relevant documents and materials including “application form”, “W8”, and “checklist of witness service materials” will be displayed accordingly in the submission page for users to download and print. Then users can download and print out these forms, then bring to the witness branch that selected before.



Picture 4-8 Application form-submission

- 9) Users can click the **"Return"** button to go back to the previous page.

5. Documents

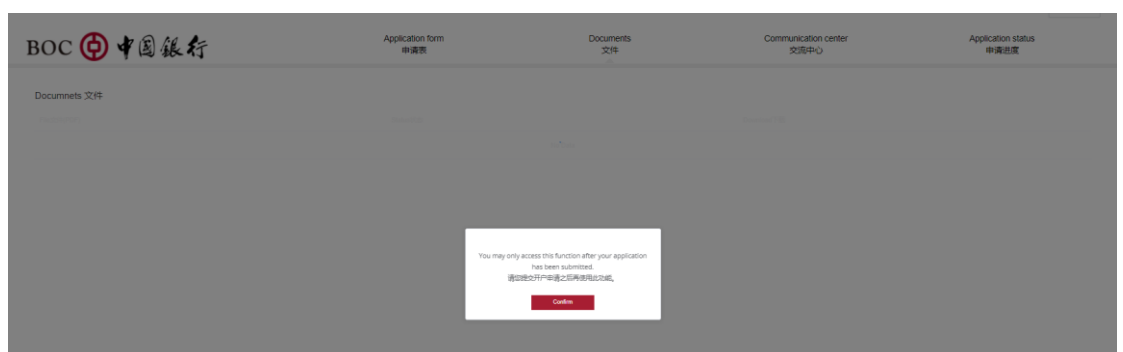
【Function introduction】

Users can download documents after the application form was successfully submitted.

【Operating instructions】

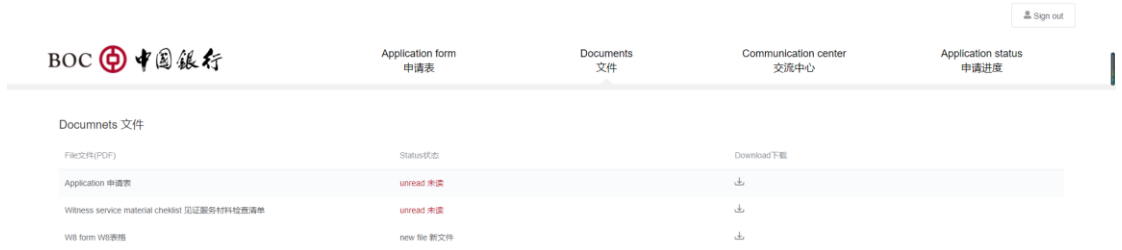
◆ Document

- 1) Users can click **"Document"** to the documents downloaded page upon the application form was successfully submitted.
- 2) If users click "Document" before they submitted application form, there will be a pop-up reminder to show that "You may only access this function after your application have been submitted". And the page will jump to the application form page after clicking **"Confirm"**.



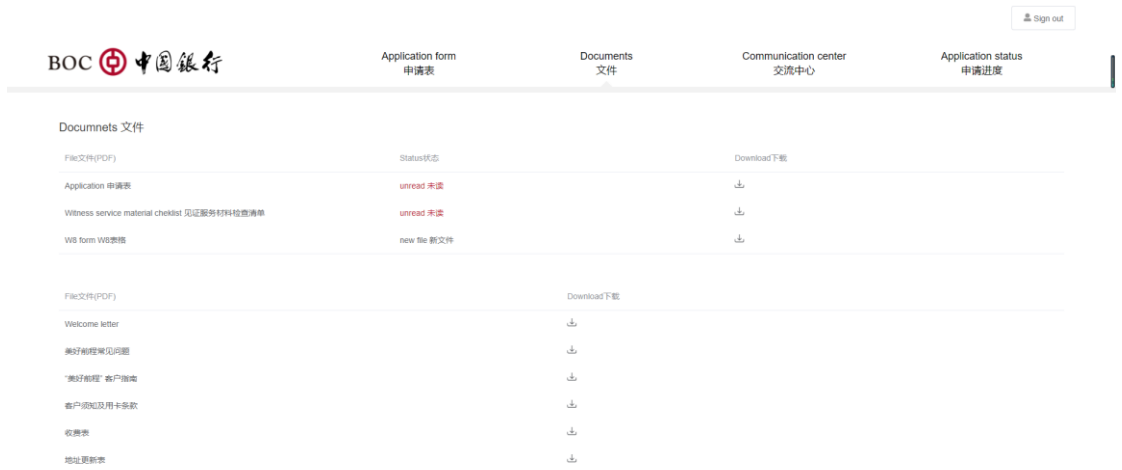
Picture 5-1 Document-reminder.

- 3) Users can download “Application form”, “W8” and “Witness service material checklist” after they successfully submitted the application form. The documents that have not been downloaded will be marked as “unread” status.



Picture 5-2 Document- download (application form submitted)

- 4) Users can download “Welcome letter”, “FAQ”, “customer guide”, “customer notice”, “fee schedule”, and “address update form” after the overseas student account was successfully opened.



Picture 5-3 Document- download (account opened)

6. Communication Center

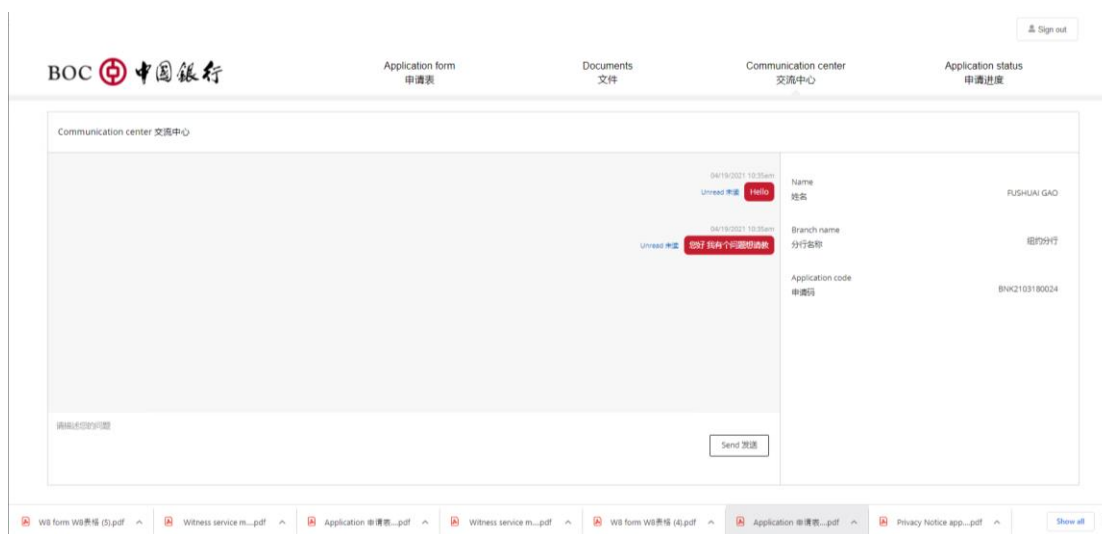
【Function introduction】

Users can communicate with customer service representatives of the bank via this channel.

【Operating instructions】

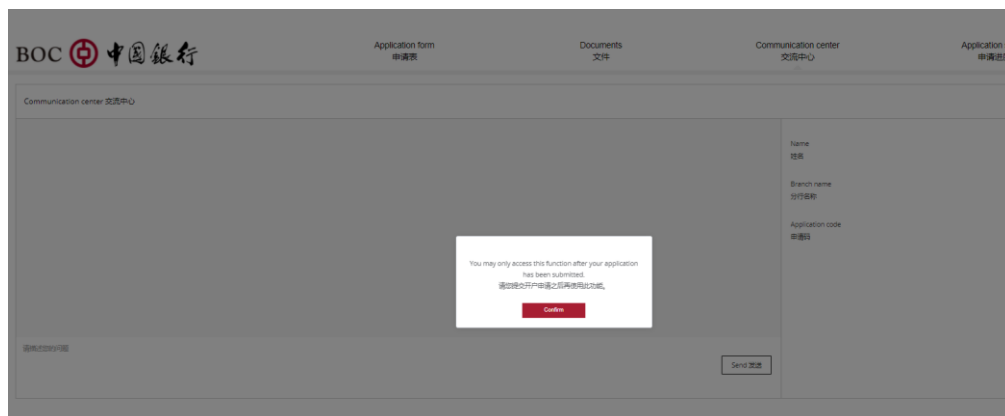
◆ Communication Center

- 1) Users can communicate with customer service representatives of the bank by entering **Communication Center**.



Picture 6-1 Communication Center

- 2) User can type the relevant questions regarding the overseas account and click **“Send”** to send out the message.
- 3) Please note that there will be a reminder to inform customers that Communication center is temporarily unavailable before they got approval during the review process.



Picture 6-2 Communication center-reminder

7. Application status

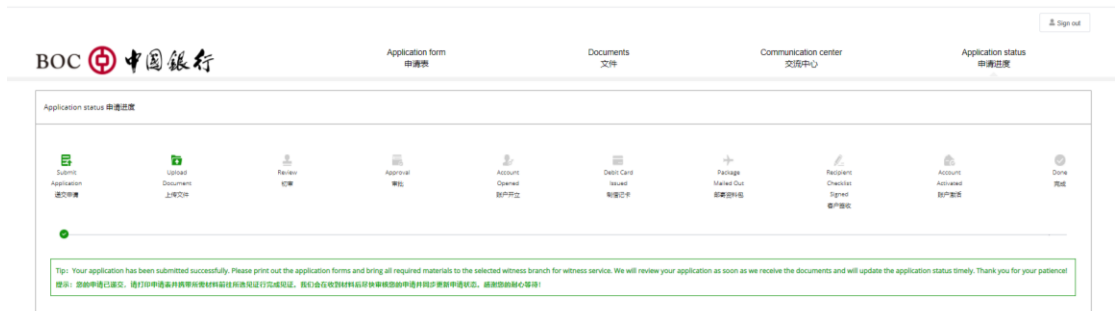
【Function introduction】

Users can check their application status accordingly and be guided to do the next step.

【Operating instructions】

◆ Application status

1) Users can click “**Application Status**” to check and track the application status.



Picture 7-1 Application status

2) Additional tips will be provided accordingly for users to proceed to the next step.



Picture 7-2 Application status-checking