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EMPLOYER PORTAL

User Guide

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The Electrotechnical JIB
Setting employment standards

Administered in England, Wales and Northern Ireland by
the Joint Industry Board for the Electrotechnical Industry



Administered in Scotland by the Scottish Joint Industry
Board for the Electrical Contracting Industry

INTRODUCTION

The ECS Employer Portal has been designed to support companies in the management of their employees' ECS card applications and assessments.

Via the portal you can:

- Make and track card applications.
- Create and manage online ECS card purchases and invoices.
- Monitor card applications on hold.
- View all current employees who hold ECS cards, along with their expiry date and card numbers.

This guide explains how to use the portal to add employees, make card applications and purchases, and set up ECS Assessments. It also outlines how you can set access permissions for others in your organisation.

1. HOW TO

1.1 How to Log in to the Employer Portal

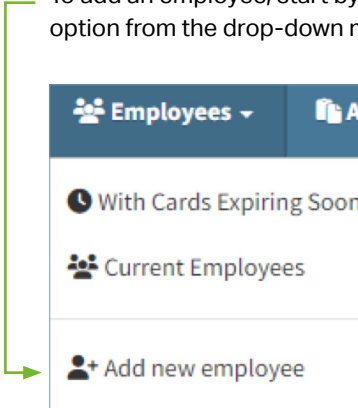
To start using your Employer Portal, you will need to sign in to your account by entering your login details.

Once logged in you will see your dashboard as shown below.

From here you can access all the features on the portal and begin setting up your employees.

1.2 How to Add Employees

To add an employee, start by clicking the **Employees** tab on the blue toolbar, then select the **Add New Employee** option from the drop-down menu as shown below.



Next,

Fill in the following details:

1. National Insurance Number
2. Date of birth

along with one of the following:

- Last name
- ECS Card number
- Health & Safety Assessment number

Please supply required information:

National Insurance Number* Date of Birth*

And at least one other piece of information:

Last Name

ECS Card Number H & S Assessment Number

Click the **LOOKUP** button to check if the employee record already exists.

If a record is found, this person can be added to your employees list by clicking **CONFIRM & CONTINUE**. If they are not found fill in the details highlighted below before clicking **CONFIRM & CONTINUE**.

Title First Name* Last Name*

NI Number Date of Birth Gender

I *Nobit Sherman* hereby confirm that the operative shown above started work with on the and that we have the right to view and modify their details.

Once these steps have been completed the employee will be successfully added to your company's records in the portal.

1.3 How to Apply for an ECS Card

To make a card application, start by selecting all the employees you wish to apply for and click **START APPLICATIONS FOR EMPLOYEES** as shown below.

Employee Nam... ↑	Apps In Progress	Card No./s	H&S status
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/> Fisher, Albert			None
<input checked="" type="checkbox"/> Jones, Jeff			None
<input checked="" type="checkbox"/> Mac, Daniel			None

Next select the **Card Type** you wish to apply for, then follow the steps below for each candidate to complete their application.

Choose Application Types					
Employee Name	NI Number	H&S	Photo	Card Type	
Fisher, Albert	SS012345B	None	None	Non-JIB Registered Apprentice - Initial	<input checked="" type="checkbox"/>
Mac, Daniel	AE564321A	None	None	Managerial - Initial	<input checked="" type="checkbox"/>
Jones, Jeff	AA654321D	None	None	Craft or Related Disciplines - Initial	<input checked="" type="checkbox"/>


Step 1 - Applicant Details

In the applicant details section add the **Business Phone** number and **Business Email** address, at the bottom of the screen. You will also need to add a photo for each employee at this stage. To do this click the blue arrow, as shown below, then select the image you wish to upload from your device.


Please click the link below for guidance on accepted photos.

<https://ecsprodstorkentico.blob.core.windows.net/ecs-public-media/jib.ecs.portals.web/media/root/downloads/documents/ecs-photo-guidance.pdf>

Please make sure that the contact details are correct. This is the address that the card issued from this application will be sent to. Note: Key personal details (Name, DOB, and NI number) are not editable.



26/09/2023



Title **First Name** **Last Name**

Mr Jeff Jones

NI Number **Date of Birth**

AA000000E 22/09/2023

Business Phone (direct dial) **Business Email** (direct email)

0134567890 jeff@email.com

Step 2 - Qualifications & Documents

In the **Qualifications & Documents** section, you may now add your employees' qualifications and other documents.

Each employee will need to have a valid **Health, Safety & Environmental Assessment** or recognised exemption. You will have an option to upload the exception in this section. Alternatively, you can select the option for how they would like to sit the Health, Safety & Environmental Assessment, if this is yet to be completed.

UPLOAD DOCUMENT AND ATTEMPT AUTOMATIC DETECTION

- i. Click the **upload document** option.
- ii. Select the file you want to upload from your device.
- iii. System will then try to detect and verify the uploaded document/s.

If verified the system will allow you to upload more files or move to the next stage. If uploads are not verified, this could be due to quality of the image not being readable using OCR, or if details on certificate do not match details held on record, the system will give the option to manually upload.

OR ENTER THE CERTIFICATE/DOCUMENT DETAILS MANUALLY

- i. Click '**Enter the certificate/document details manually**' option.
- ii. Choose the Qualification **Awarding Body** or **Reference Type** from the dropdown list.
- iii. Follow the instructions on screens depending on the chosen **Awarding Body** or **Reference Type**.
- iv. Click check details (with the awarding body).

The system will attempt to verify your qualification; once verified it will pop up guidance advising the qualification has been automatically verified.

- v. Click continue.
- vi. Follow the instructions on screen.

Successfully read images will appear on screen and system will confirm this has been added to account.

Once all relevant documentation has been uploaded, please click **NEXT STEP >** to progress to the Occupations and Grading Section.

Step 3 – Occupations & Grading

In the **Occupations & Grading Section**, fill in the occupational discipline and grade you are applying for.

1. Click on **Craft or Related Disciplines Card Type** as highlighted below.
2. Next select the **Main Occupation**.
3. If there is an option to select the Grade, select the correct grading and add any **Additional Occupations**.

Occupational Definitions & Grading ?

Craft or Related Disciplines Card Type **CHANGE**

Main Occupation **CHANGE**

Additional Occupations

Occupational Definitions & Grading ?

Craft or Related Disciplines Card Type change
Core - Electrical

Main Occupation change
Maintenance Electrician Existing

Grade change
Maintenance Electrician Existing

ECS Registered Electrician Scheme ? change
You registered for the ECS Registered Electrician Scheme on 03/09/2018

Additional Occupations change
None

Finally review the section and click **FINALISE & REVIEW** > to move to the next page.

You can also watch the video below on how to start your employees ECS Card Applications.

[ECS Employer Portal | Electrotechnical Certification Scheme \(ecscard.org.uk\)](https://www.ecscard.org.uk)

1.4 How to Finalise an Application

Step 4 – Finalise & Review

Click **FINALISE NOW**, preview the application summary & scroll to the bottom of the screen and tick the declaration box to confirm you understand the agreement & click the finalise now button as shown below. Your application will now show in the Finalised Section.

I confirm that,

I have read and agree with the **terms and conditions** and that I understand there a no refund policy.

FINALISE NOW

← RECHECK JEFF JONES'S APPLICATION

On your dashboard under the **Applications** tab, select **Applications Requiring Attention**. Under **Finalised Applications - Awaiting Ordering**, click the box next to the applicant number.

1 Finalised Applications - Awaiting Ordering

<input type="checkbox"/>	App. Ref.	Applicant	Employed By	In Group	H&S	Photo	Type	Applying For Grade	Applying For Occupation	
<input checked="" type="checkbox"/>	2866999	Jones, Jeff			None	OK	Craft - Initial	Electrical Labourer (2018)	Electrical Labourer (2018)	

Select **ADD APPLICATIONS TO A PURCHASE** as highlighted below. You will be prompted to add these applications to an existing order or create a new one.

1 Finalised Applications - Awaiting Ordering

ADD 1 APPLICATIONS TO A PURCHASE
UNFINALISE 1 APPLICATIONS

<input type="checkbox"/>	App. Ref.	Applicant	Employed By	In Group	H&S	Photo	Type	Applying For Grade	Applying For Occupation	
<input checked="" type="checkbox"/>	2866999	Jones, Jeff			None	OK	Craft - Initial	Electrical Labourer (2018)	Electrical Labourer (2018)	

1.5 How to Create a Purchase Order

Click **+ CREATE A NEW ORDER** and fill in the details that are requested.

You will have the option to close the order and proceed to payment or close and pay later.

Add all the relevant information and proceed to the payment section by clicking the green button, **CLOSE ORDER & PROCEED TO PAYMENT**.

You can also click on the blue button **CLOSE ORDER BUT PAY LATER** if you wish to complete the payment later.

Select Order to add selected Applications to?

There are no pending orders available **+ CREATE A NEW ORDER**

X CANCEL

Select Order to add selected Applications to?

Create new order with:

Your Reference / P.O. Number <input type="text" value="Initial Application JJ"/>	Raised at level of Office Purchase - ECS Check Company 2 Head Office ▾
Billing To Office ECS Check Company 2 Head Office ▾	Deliver to Office ECS Check Company 2 Head Office ▾
Accounts contact <input type="text" value="Mr Accounts"/>	Delivery to the attention of <input type="text" value="Ms Cards"/>

£ CLOSE ORDER & PROCEED TO PAYMENT **CLOSE ORDER BUT PAY LATER**

ADD APPLICATIONS BUT LEAVE ORDER OPEN **X CANCEL**

1.6 How to Complete a Payment

On the payment screen that appears:

Click **PAY** and you will be redirected to the payment screen to complete your order.

Confirm Pay For Order Initial Application JJ?

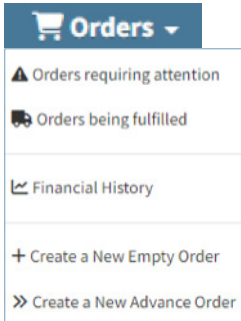
I wish to pay by

Please click Pay Now to be transferred to the Payment Gateway to collect £54.00 from your Credit or Debit card.

PAY **X CANCEL**

1.7 How to Create an Advance Order

Advance orders allow employers to add money to their employer portal account to be used for future card applications. To do this you will need to click on **Orders** on your Employer Portal dashboard and select **Create a New Advance Order**.



Next select how many orders you want to purchase and add your **Reference Number** and **Accounts contact** details.

>> Create an Advance Order

Your Reference / P.O. Number 123456		Raised at level of Group Purchase - Eastern	
Billing To Office ECS Check Office 2 - EASTERN		Accounts contact World Services	
Quantity	Product	Each	Total
1	ECS Card Advance Payment	£250.00	£250.00

You can select to pay with a credit card using the green button shown above, or via bank transfer.

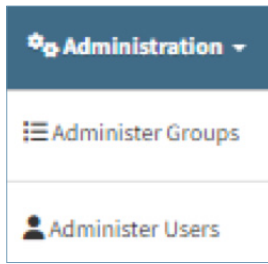
If you choose the bank transfer option, your order will be on hold until transfer has been received.

Marked for BACS allocation

You have marked this Advance Payment for payment by BACS. Please note that the funds will not be available until the payment has been allocated by the finance department on its receipt. This may take up to 2 weeks. Please annotate your electronic payment with our reference ECS0944490. Failure to use the exact reference number will delay processing your payment.

1.8 How to Add/Modify an Administrator User

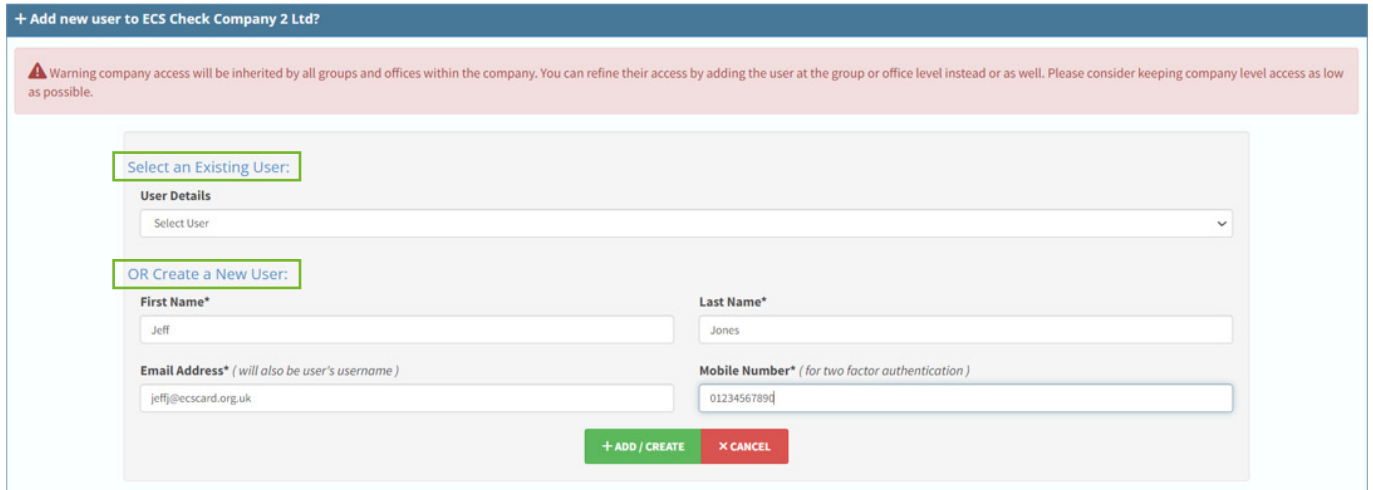
On your Employer Portal dashboard under administration click on **Administer Users**.



Click on **ADD USER** to add a user or click on the **Edit** icon to modify a user as highlighted below.



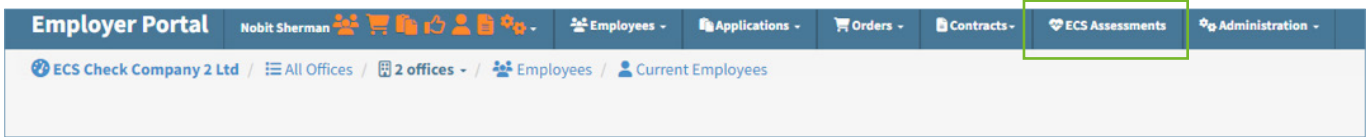
Next, you will have an option to select an existing user or create a new one. To create one enter all the details before clicking the **ADD/CREATE** button.



The employee will now be added to your portal records.

1.9 How to Purchase Credits for ECS Online Assessments

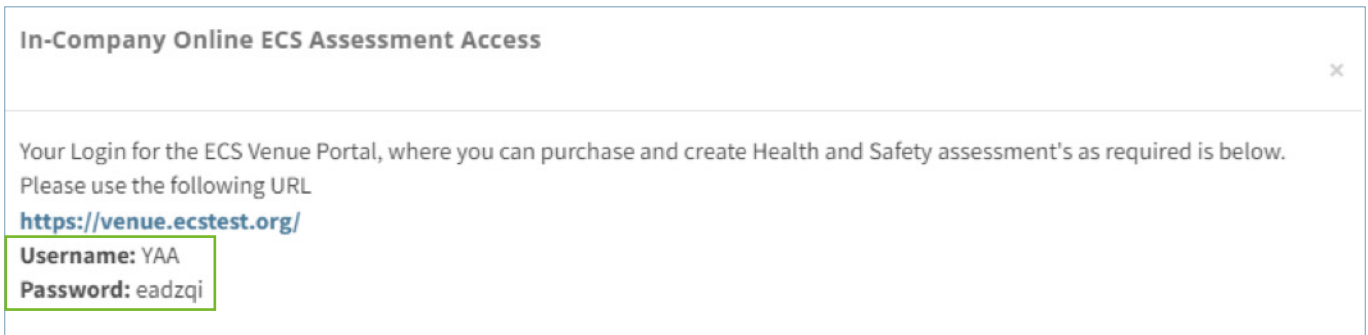
In your Employer Portal dashboard, click on the **ECS Assessments** tab to log in to the ECS Online Assessment portal.



Next click the link in the pop-up box that appears as shown below.

Please note: Your username and password are automatically generated as shown below.

Once you click the link you will be redirected to the ECS Assessments portal.




















<https://venue.ecstest.org/>







Further details on the assessment system and setting up exams can be found in the **ECS Online Assessments Company Guide**, available to download here <https://www.ecscard.org.uk/content/Employers>

2. APPENDICES

Employer Portal Icons Explained

	Full Employee Access: user can view, add, and leave employees and change employee details
	Full Purchasing Access: user can view purchases, create new purchases, add to existing purchases, and complete purchases
	Full Applications Access: user can view, fill in and finalise card applications
	Full Applications Endorsement Access: user can endorse change in grading and endorse qualified supervisor status
	Full User Admin Access: user can add and remove users, change user permissions, and reset user passwords
	Full General Admin Access: user can create company groups and can edit employer details
	Can View Employees Can View Purchases Can View Card Applications
	Can Reset User Passwords
	Can Use Funds
	Can Complete Card Purchases
	Can Change Employee Details Can Fill In Applications
	Can Add Users Can Add Employees Can Create New Purchases
	Can Remove Users Can Remove Employees
	Can Change User Permissions
QS	Can Endorse Qualified Supervisor Status
	Can Add/Remove Contract Workers
	Can Add Subcontractors
	Can Add to Existing Purchases
	Can Endorse Change in Grading
	Can Create Contracts as Client
	Can Create Company Groups
	Can Edit Employer Details
	Can View Contract Details

Portal Sections Explained

 Employees	With Cards Expiring Soon	Information on ECS Card holders registered with your company with cards expiring or expired.
	Current Employers	Information on ECS Card holders registered with your company.
	Add New Employee	Quick link to add a new employee to your portal.
 Applications	Applications Requiring Attention	Overview of all applications, started by your company, which are in process but not yet completed.
	Applications Being Produced	The processing team has the application in hand and the status of the application can be seen.
	Completed Applications	Applications which have been fully processed, where ECS card will be dispatched shortly. Completed applications remain visible for three months.
 Contracts	Contracts Being Set Up	These are contracts set up for ECS Check in your account.
	Contracts in Progress	Any contract application in progress will show under here.
	Contracts Completed	Any processed contracts will show here.
	Create New Contract	This option allows you to create a new contract for ECS Check.
 Administration	Administer Groups	Basic administration such as amending office contact details, amending office structure.
	Administer Users	Individual users at any company level can be added and managed here. JIB/ECS gives access to 'super users' for each company. Companies should maintain their own users at all subsequent levels including individual employees.
 ECS Assessments	ECS Assessments	To log in to the ECS Assessments portal where you can book assessments.
 Orders	Orders Requiring Attention	These are outstanding orders that need action to complete.
	Orders Being Fulfilled	These are orders that have been completed and paid for.
	Financial History	This is the financial history of all ECS card purchases made on the account.
	Create a New Empty Order	This option allows you to create an order before applying for an ECS card and the order can be used against a future card application.
	Create New Advance Order	Advance order allows you to add credits to your account which can be used to pay for ECS cards in the future. The minimum order which can be purchased is 1 credit equivalent to £250.



is administered by the



in England, Wales & Northern Ireland
ecscard.org.uk

and by



in Scotland

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