

electrotechnical certification scheme

TRAINING Providers

ECS Employer Portal User Guide

ecscard.org.uk



TRAINING PROVIDERS

ECS Employer Portal User Guide

Introd	uction	3
1. How	r to Use the ECS Employer Portal	
1.1	How to Access the ECS Employer Portal	3
1.2	How to Register Apprentices and Trainees	4-5
1.3	How to Finalise Apprentice and Trainee Registrations	5-6
1.4	How to Complete a Payment	6-7
1.5	How to Complete Bulk Upload Applications	8-9
1.6	How to Add/Modify an Administrator User	10
2. App	endices	11-12

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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 and training providers in the management of their employees' ECS card and assessments applications.

This guide explains how the main sections of the ECS portal work and how you can add employees, make card applications and purchases, set up ECS Assessments, as well as set permissions for those who will have access to the portal.

As a Training Provider you can access the ECS portal to:

- Make and track card applications.
- Create and manage online ECS card purchases and invoices.
- Monitor card applications on hold.
- Apply for Apprentice & Trainee ECS cards.
- Apply using the Bulk Upload function.

1. HOW TO USE THE ECS EMPLOYER PORTAL

1.1 How to Access the ECS Employer Portal

To start using the ECS Employer Portal, you will need to login to your account.

Certificat scheme	chnica ion
Sign in to the ECS website	toon.
jett@ecscard.org.uk	S

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

(Prs		Search	Joint Help Amount	C5. Training Private	a tiena 103	Clerk Card Types	Nobit Sherman	(
	electrotechnical certification scheme	Existing Cardbolders	Employers	Clients & Specifiers	Health	n & Safety ument	How to Apply	ECS Dashboard	
	Home Employer Portal								
Employer Porta	1	Mitteraturen - Bildestindinen	- MOrden	- Blankacta-	TTS Associations	-	-		
C EC3 Check Company	r3.Ltd = IEAltOffices - 22.offices -								🛛 Get Help
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Company Name Head Office 🔹	ECS Check Company 2 Utd ECS Check Company 2 Head Office			JIB Number Hubble Road, Chelb	enham, Gloucestersh	H0075820 ne, 61.52 008			
All Offices - 2 Office	66 ()			_					* 33
Cards Expiring / E	xpired writes 2 margins		^ X	P Applications	On Hold				^ X
No employees with expl	ring cards			No applications o	n held				

From here you can access all the features on the portal, register apprentices and trainees and apply using bulk uploads.



1.2 How to Register Apprentices and Trainees

To add an apprentice or a trainee start by clicking the **Apprenticeships/Trainee** tab on the blue toolbar, then select the **New Apprentice/Trainee Registration** option from the drop-down menu as shown below.

🖪 Trainees 🛨	Apprenticeships +
New Trainee registration	New Apprentice registration
Trainee registrations requiring action	Apprentice registrations requiring attention
Trainees in progress	Apprenticeships in progress

Next fill in the details of the apprentice/trainee. You also have the option to search for an apprentice/trainee on the ECS Portal. If they are already on the system, you can select them and continue to fill in any further details.

				Apprentice Personal Details			
	Title*		First Name*	Middle Name		Last Name*	
-	Mar	÷	Jeff			Jones	
Neumage	NI Number*			Date of 5	ieth* mostan (3	Gender*	
-	AA6543210					1 M.	
ease enter at least one p	Fill in the apprentice Health and Salety Ass	assment	e and Drive of Birth and Click Search o Mobile Phone	rma the opprentice in our database and check for the existe	Business Phone Idirect d		
01234001000			97761234367		0133456061		
ease enter at least one v insonat Email eff.jond?5@ec.co.uk	alid email address:		9778123498F	Business Email (direct email)	01334360867		
kase enter at least one v monat Email jetjonet%≘ecktouk Line 1*	alid email address:		97781234987	Business Email (direct email)	01334960887		
lease enter at least one v. ersonal Email jeftjonet%gecistouA Line 1* Unit2	alld email address:		977912249817	Business Email (direct email) City* Seminy	DIJANJAGORT		
kase enter at least one v monat Email effjored™s⊕ecktouk Line 1* Unit2 Line 2	alid email address:		07781234987	Business Email (direct emisit) City* Snorthy County	D133946087	ountry:	
ease enter at least one v rseeat Email efficient/Specificale Unit 2 Unit 2 Unit 2	alid email address:		977N233698T	Business Email (direct emisit) City* Security County Nort	D.1.3-Sylecter	suntry . Webst KingSon	
lease enter at Teast one v rrional (mail enflowed?h@ecstouk Line 1 Une 2 milie dak Square Line 2	alid email address:		977N233498T	Business Email (direct email) City* Searchy County Nort Postcode*	C	autry: Juried Keigdon	

Fill in the Apprenticeship/Trainee Details, select the Apprenticeship/Trainee Pathway and the Apprenticeship/ Trainee Start Date. You will also need to confirm if the apprentice/trainee has completed a Health, Safety and Environmental Assessment.

Health & Safety Assessment	Passed H&S unit in apprenticeship	Apprenticeship Start Date* 11/08/2023			Apprenticeship Pathway*
	2	- 21 - 11 - 11 - 11 - 11 - 11 - 11 - 11		1075	INSTALLATION ELECTRICIAN
	Train	ee Details			
	Train	ee Details			
Health & Safety Assessment	Train Passed H&S unit in training programme	ee Details Trainee Start Date*	11/12/2023	a	Trainee Pathway*



Finally, add the **Apprentice/Trainee Employer Details** and when completed click **SAVE**. The apprentice/trainee and their employer will be sent an email to confirm the details you have added.

	Apprentice E	mployer Details			
Enter the postcode of the Employer and click Search so that w employers	w constitute you a list of existing	C, SEARCH FOR EMPLOYER			
Employer Name*					
18					
Line 1*		City*			
Line 2		County		Country	
				Ushed Kingdom	~
Line 3		Postcode*			
Employer Contact Details Tirle* First Name*	Middle Name		Last Name*		
Min v Rohm			Doughting		
Phone Number*		Email*			
07263456709					
	(C) LANK	K CANCEL			
	Your registration details h	ave been saved successfu	ally		
		Dox			

1.3 How to Finalise Apprenticeship/Trainee Registration

To finalise an apprenticeship/trainee registration, click the **Apprenticeships/Trainees** tab on the blue toolbar, then select the **Apprentice/Trainee registration requiring attention** option from the drop-down menu, as shown below.



A list of all registrations waiting to be finalised will be shown. You can select individual or multiple registrations to finalise by ticking the box as shown below.

B A	pprentice registr	ations which require attention					
Re	gistrations still b	eing filled in					
Energy Ref.	Applicant	MLS	Photo	Start Date	Stops	Office Contact	
Rent of the later	e 3 anneeuworde 5 heaterstandows Aggelicant 14 aert Apres	MAS 1983 Miladore 📼	Plats	Start Date 2012/2023	Stage 1	Office Contact Taña Adams	q

If submitting multiple registrations click on **FINALISE APPRENTICE/TRAINEE REGISTRATIONS**, or for individual – registrations click on the flag symbol shown above.

and the stand shake in the start of the		
A Passa control y	unit to inter the equilibrium of builded. Once does the struct by possible Key possible and how to equilibrium the equilibrium. The equilibrium the equilibrium to be solid to the equilibrium to be possible them.	A
	Division of Francisco X Concell	

Next click on **MARK AS FINALISED** to move forward or **CANCEL** to make any changes. Once completed they will appear under Registrations ready for ordering as shown below.



To submit your purchase, use the tick boxes to select the registrations you wish to add to your order. Then add the details of the key contact for your company, as shown below.

1	-	NATIONS TO BE CARDER	urrections.					
	Ref.	Аррікант	nks	Posta	Start Date	Steps .	Office Contact	
	13174	left loves	Michael and Market	=	3		Taña Adares	
•	13979	Ruby Dawk	HL3 Hotels 🛄		3		Toky Light	
10	ente a por	nchara to add anhected Registrations to						
	nole a por late tree la real Refere (214)	nchere to add selected Registratives to ader with: me / R.D. Hemiljer		Billivery in the attention of				
	nata a par late treve to nar Refere (cost) lessonite co artication	erchann to add selected Registrations to mine with: mer / R.D. Number soliait		Distory to the attention of and areas				

1.4 How to Complete a Payment

To pay for your order, start by clicking the **Orders** tab on the blue toolbar, then select the **Orders requiring attention** option from the drop-down menu as shown below.



Click on the plus sign to open the order.

0	orde	ers awaiting	payment							
		Sets.	Cost. Rel.	Our Bel.	Reised At Lut.	Status	Card Batches	fa Vet	we.	Balarree Due
	÷	05/05/2024	12110	6080997396	Company: ECE Oreck Company 3 Uni	Obere Awarting Paymone	\$100.00	\$294.00	246.00	628130



Click on the PAY NOW button to proceed, or select other options if you need to make any changes.

ers awai	ting payment											
Sete.	East. Pet	Dur Ref.	Raised &t 1st.		Status		Card Batche		- 147	487		Balance Do
min1.909	106	0030007288	Company - BCS Check Company 3 Unit		Oraid: An		C 010839		254.00	246.03		colorise
rder - 123 tertei Class - Anni tronice Tar erectroccia DCS Cardin	15 Ing Physional Ingachy 3 Head DRice	Noised Oni Bioliustoot Indiana Samaa Aff Annas Samaa (CS Chaok Company Linual Office	National Pays Harmagnet state (Splitting and		0	wheed at Lover Investory 1995 Nat Ref: ELectoryzawi	dea heyey mi	2.4 [3.4	ram 💽		KALITE	
Barth: \$103	S36 Analyses			Carol Taxon	Ann Tran	Rafas	duala	Accustics	6.007	-	Real	
2143.639	James, Juff (Doctor)) - John	Conductory Search (Deft.	(vila)	Availing : Payment		JRAggrowthis Training Schemer 2017	GUT.00	61.4	D4546	0
2923348	Bash, Ruby committee - Join	f mahvatry Boards		219 [#]	tine:	Assert		JBAppentice framing	1317.00	773.40	1101.00	

Next you will need to select your payment method. You can pay via electronic transfer or via debit or credit card.

Credit Card Payment Option

BACS Payment Option

Confirm Pay For Order 12345?	Confirm Pay For Order 12345?				
I wish to pay by Credit/Debit Card	I wish to pay by Electronic Transfer (BACS) ▼ A Please note that the applications will not be started 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 EC50997286. Failure to use the exact reference number will deby processing your payment.				

Once you have made your payment your apprentice/trainee cards will be processed.



You will be able to check the progress of the applications by clicking on apprenticeships in the blue ribbon and selecting **Apprenticeships/Trainees in progress.**

🌣 Apprent	iceships	in progress	8						
Apprentice Name		febena	,	Mart Date	. 7	Stage	τ Pe		• Nove Stage
	τ.		7	T		τ.		7	
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Lances I		1117 dli Approxica Scheme		11/06/3821		1-0212320	-	TALLANTS IN STREAM	000
James Donaghter		2107-30 Appretice Scheme		e606303		1-I0102(0100	114	entoweccourchicke	000
and seens		THT ALL Approximition Scheme		adigment		1.0000.009		Taul ATION (URCTR) (MA)	000
No Sea		2137-88 Approxitie following		1.04303		1.9099300	÷.	failing Contracts	000



1.5 How to Complete Bulk Upload Applications

To complete applications using the Bulk Upload function, click on the **Applications** tab on the blue toolbar, then select the **Bulk Upload** option from the drop-down menu as shown below.



Next click on VIEW YOUR APPLICATIONS.

Bulk Upload o	f Application	1S	
File Upload			
Select CSV, TXT and	JPG files to uploa	ad	
Only Time with emergence of CD CDV or TST Net which we not a	t TAT as JFG will be successful the regional formul will solt be	ly ogfisaalled rogdcaelled	
MUNCT PURCE; TO UPLOAD	1000 1000 APRIL (APR)	RESET THE BULKLIPLOND	

Click on ADD APPLICATION.

Ree	quest	ed A	pplica	ations									
												- ADD APPL	CATION
Title	Firstname	Initials	Lastname	DateOfBirth	Gender	NINumber	ECSNumber	Occupation	HSAssessment	RequestType	Fee	Image	Valid
VERIFY	APPLICATIONS	FINALISEV	IALID APPLICATIO	NS UPLOAD HOP	REFILES								

Fill in the application details required.

	Title		First Name		initials		Lest Name		
	Max	19	Theres				Campbell		
1919	Gender		Date of Birth volume	62	NI Number		ECS Number	Nobile	
1-1-1	1.	2.4			545007154			strassasta	
	Email			145 Au	reconant	Request Typ	pa -	Occupation	
1	thirty and a second second second	and the second				Replaceme	in -	317 - Experienced Runker CellA	

Once all information has been added, click on SAVE CHANGES, to return to your applications click on BACK TO SUMMARY.



Click on + ADD APPLICATION to add more applications or to proceed click on FINALISE VALID APPLICATIONS

Requested Applications T ADD APPLICATION Valid Title Firstname Initials Lastname DateOfBirth Gender NINumber ECSNumber Occupation HSAssessment RequestType Fee image 07/08/1989 NN000015A 317 42.00 Miss Sharon Campbell Ŧ Replacement EDIT Miss Ruth Millions 19/12/1990 F NN000025A C1125601 317 Replacement 42.00 Mr Paul Davis 04/07/1968 м NR1617860 17 Renewal 42.00 EDIT. FINALISE VALID APPLICATIONS UPLOAD HORE FILES VERIFY APPLICATIONS

Next create your order by completing the details below:

our Reference / P.O. Number	Raised at level of	
	Company Purchase - ECS Check Company 2 Ltd	
illing To Office	Deliver to Office	
ccounts contact	Delivery to the attention of	
BHIT PURCHASE		

Once completed click on SUBMIT PURCHASE.

To complete the purchase please see section 1.4 How to Complete a Payment.



1.6 How To Add/Modify an Administrator User

On your Portal dashboard under Administration click on Administer Users.



Click on ADD USER to add a user or click on the edit icon shown below to modify a user.

Administer Users				
Ets Check Company 2 Cur 23 Contains Level Unit				
Sales Banana	Damana / Enal	Robin Survive	Autor	•
10,544	that provide a state of the sta	at replaced and	ana ana	/ 0
	Report Discount of a		ALC: NO. OF BRIDE	1 1

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

+ Add new user to ECS Check Company 2 Ltd?	
Warring company access will be inherited by all groups and offices within the company. You can re as pensible.	ofine their access by adding the user at the group or office level instead or as well. Please consider keeping company level access as low
Select an Existing User User Details	
Select User	
OR Create a New User:	
First Name*	Last Nama*
Jaff	Janes
Email Address* (will also be user's username)	Mobile Humber* (for non-factor authentication)
prfpDecaurd org.vk	01234567890
	A son / departs

The user will now be added to your portal.



2. APPENDICES

Portal Icons Explained

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



Portal Sections Explained

	Applications Requiring Attention	Overview of all applications that have been started and are in the process of completion by your company.				
S Anneline Lines	Applications Being Produced	The processing team has the application in hand and the status of the application can be seen.				
- Applications	Bulk Uploads	The process for submitting a number of registration applications at the same time.				
	Completed Applications	Applications that have been fully processed and the ECS card will shortly be dispatched. Completed applications remain visible for three months.				
	New Apprentice Registration	Quick link to add a new apprentice to your portal.				
Apprenticeships	Apprentice Registrations Requiring Attention	Overview of all apprentice applications that have been started and are in the process of completion by your company.				
	Apprenticeships in Progress	Apprentice applications in progress.				
¢ ₽ Administration	Administer Users	Individual users at any company level can be added and managed here. Whilst the JIB/ECS gives access to the 'super users' for each company, at all subsequent levels and for individual employees, companies can and should maintain their own users.				
	New Trainee Registration	Quick link to add a new trainee to your portal.				
Trainees	Trainee Registrations Requiring Action	Overview of all trainee applications that have been started and are in the process of completion by your company.				
	Trainees in Progress	Trainee applications in progress.				
	Orders Requiring Attention	These are outstanding orders that need to be fulfilled.				
	Orders Being Fulfilled	These are orders that have been completed and paid for.				
	Financial History	This section shows financial history of all ECS card purchases made on the account.				
ेल Orders	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 top up credits to your account that can be used to pay for ECS cards in the future, minimum order that can be purchased is 1 equivalent to £250.				



is administered by the



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





in Scotland Tel: 0131 445 9216 Email: ecs@sjib.org.uk sjib.org.uk