TRAINING PROVIDERS

ECS Employer Portal User Guide

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The Electrotechnical JIB
Setting employment standards

SCOTTISH JIB

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.

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

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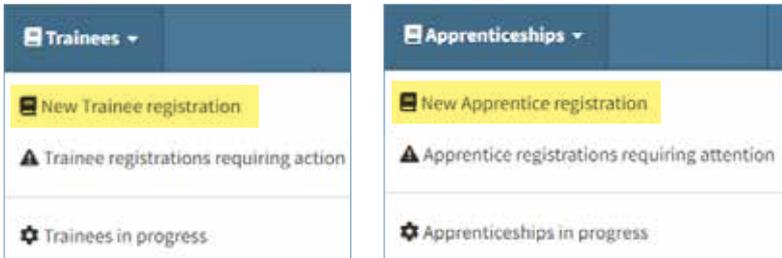
Next fill in the details of the apprentice/trainee. You also have the option to search for an apprentice/trainee on the ECS Portal. If they are already on the system, you can select them and continue to fill in any further details.

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.

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.

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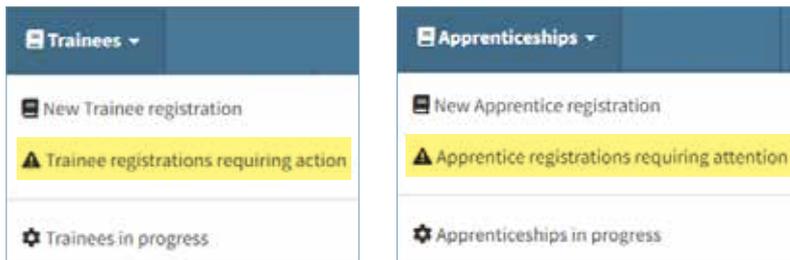
A list of all registrations waiting to be finalised will be shown. You can select individual or multiple registrations to finalise by ticking the box as shown below.

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

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.

Click **SUBMIT PURCHASE** once completed.

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.

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

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

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.**

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.
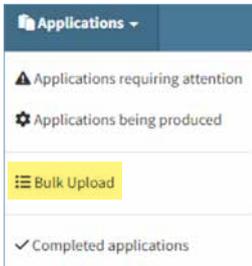
Next click on **VIEW YOUR APPLICATIONS.**
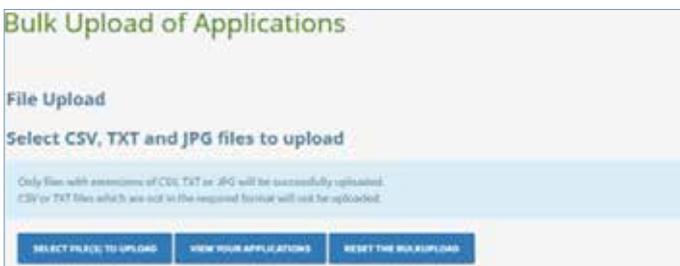
Click on **ADD APPLICATION.**

Fill in the application details required.

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

Title	Firstname	Initials	Lastname	DateOfBirth	Gender	NINumber	ECSNumber	Occupation	HSAssessment	RequestType	Fee	Image	Valid	
Miss	Sharon		Campbell	07/08/1989	F	NN000015A		317		Replacement	42.00		✓	EDIT
Miss	Ruth		Millions	19/12/1990	F	NN000025A	C1125601	317		Replacement	42.00		✓	EDIT
Mr	Paul		Davis	04/07/1968	M	NR161786D		17		Renewal	42.00		▭	EDIT

VERIFY APPLICATIONS   **FINALISE VALID APPLICATIONS**   **UPLOAD MORE FILES**

Next create your order by completing the details below:

Create new order with:

Your Reference / P.O. Number

Raised at level of

Company Purchase - ECS Check Company 2 Ltd

Billing To Office

Deliver to Office

Accounts contact

Delivery to the attention of

SUBMIT PURCHASE

I understand that by completing this form and clicking Submit Purchase my applications will be finalised using the data and images shown on this page.

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.

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.
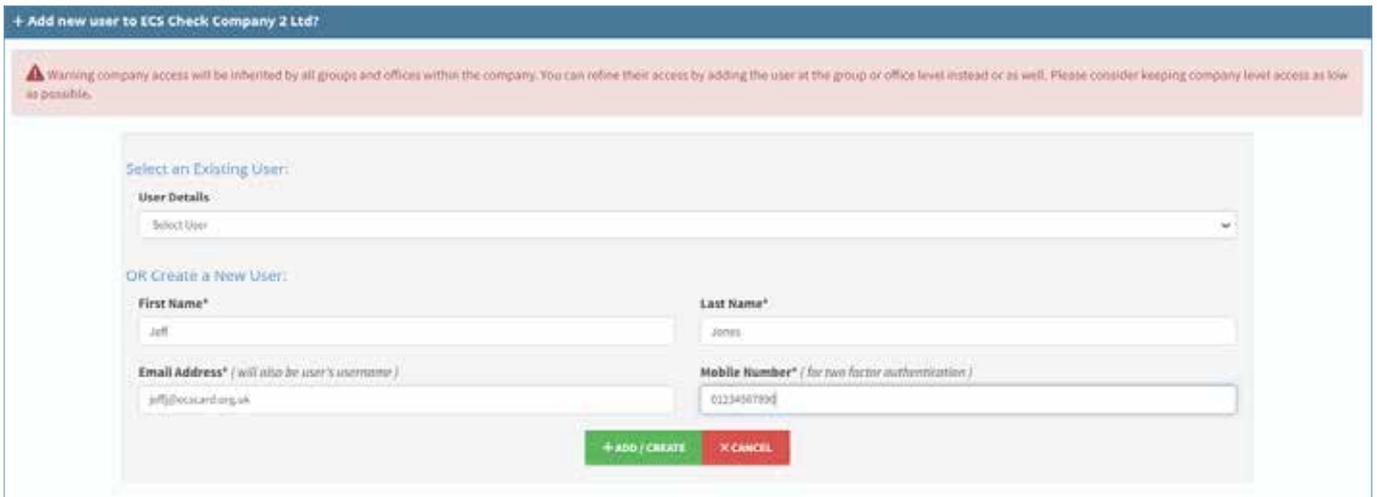
The user will now be added to your portal.

2. APPENDICES

Portal Icons Explained

	Full Employee Access: user can view, add, and leave employees and change employee details
	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
	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

Applications	**Applications Requiring Attention**	Overview of all applications that have been started and are in the process of completion by your company.
	Applications Being Produced	The processing team has the application in hand and the status of the application can be seen.
	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.

Apprenticeships	**New Apprentice Registration**	Quick link to add a new apprentice to your portal.
	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.

Trainees	**New Trainee Registration**	Quick link to add a new trainee to your portal.
	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	**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.
	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.

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The electrotechnical certification scheme

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