EmploymentCheck.

DBS Admins
System User Guide

Version: V3
Written by: Richard Anderson
Publication Date: 29/09/2025

Contents

EmploymentCheck.

1) Accessing the DBS system

1.1. The Home Page

From the Homepage, you can:

- Go to the 'Login' page.
- View the 'Privacy Policy' page.
- View the other homepage content such as the 'DBS Guidance' page.

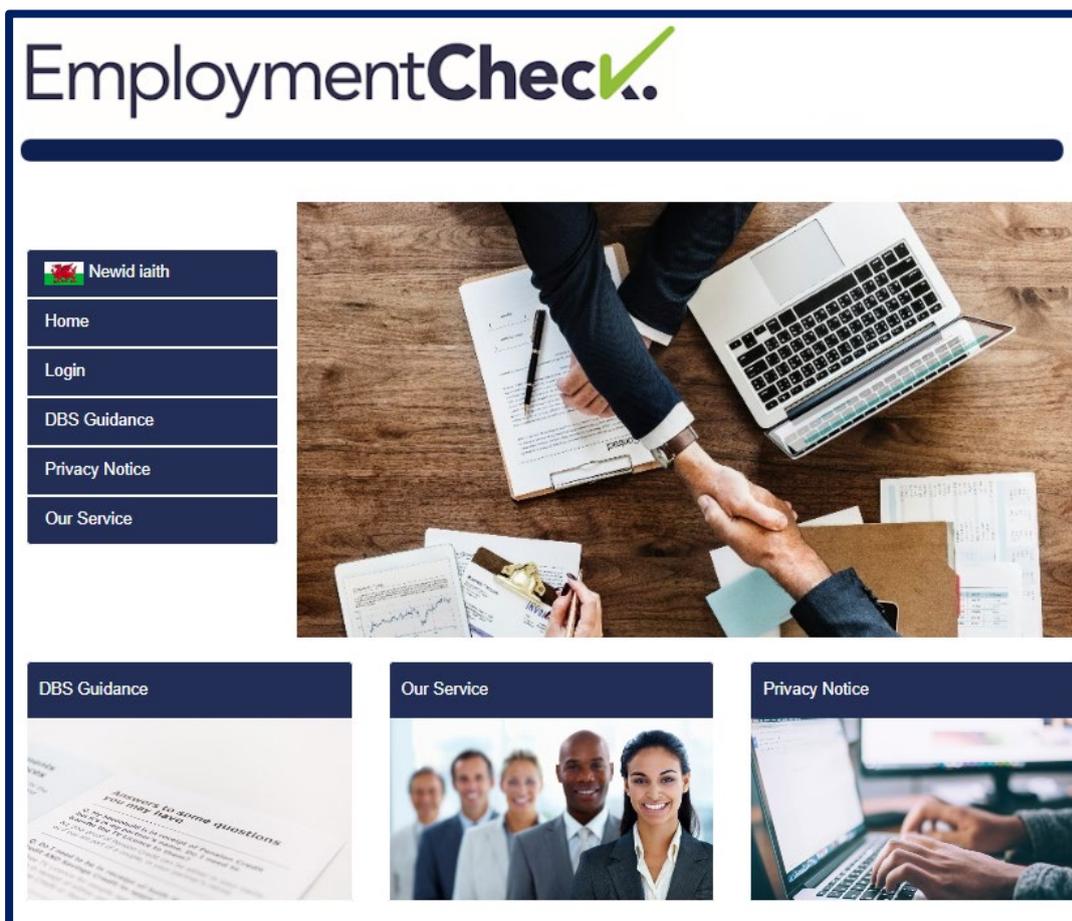*Fig 1. EmploymentCheck Homepage.*

1.2. Logging onto the system

When your DBS account is created by your organisation, you will receive an automated email from the DBS system which contains your access credentials.

This email will contain your username and a link to set your password; this link will appear as 'Set a new password' within the email. Click on this link to set your chosen password.

Password: <u>Set a new password</u>

Fig 2. Set a password email link wording.

Passwords must be at least ten characters in length and contain characters from three of the following four categories:

1. **Alphabetic uppercase characters (A through Z)**
2. **Alphabetic lowercase characters (a through z)**
3. **Numeric 10 digits (0 through 9)**
4. **Non-alphabetic Characters (for example, $, #, %)**

Enter and re-enter your password into the fields indicated onscreen. The system can generate a password by clicking on the 'Generate' button, you will then need to re-enter the same password manually.

Reset your password: Test Applicant

Enter your new password *

⧖ Generate

Confirm your new password *

Reset Password

Fig 3. Set password confirmation fields.

Once you've set your password and securely made a note of it, you can now login to the DBS system. Enter the username provided to you in the account creation email along with the password you have set.
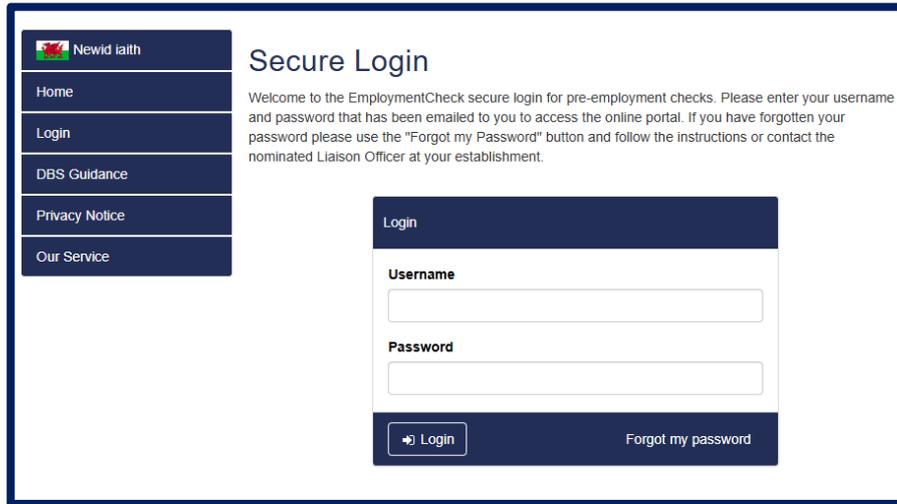
Fig 4. Example 'Login' page.

Once the username and password have been entered and you've clicked on the 'Login' button, you will be presented with the 'MFA Registration' page.

> Use of Multi-Factor Authentication (MFA) is mandatory for all Admin and ID Verifier accounts on the EmploymentCheck system.

1.3.   MFA

There are two MFA methods in use on EmploymentCheck; using a certified third-party iOS/Android authentication app to register a device and generate a One-Time Passcode (OTP) for each logon attempt **or** via an OTP code sent via email to the users registered email address for each logon attempt. In both instances, the OTP code is required each time the authenticated user attempts to access the system.

> Using your credentials and the OTP together means two-factors are required to allow access to the system, this helps to protect your organisation information.

1.3.1 App Method

When you have logged into the DBS system, you will be presented with the below screen where you will need to register to use Multi-Factor Authentication (MFA):
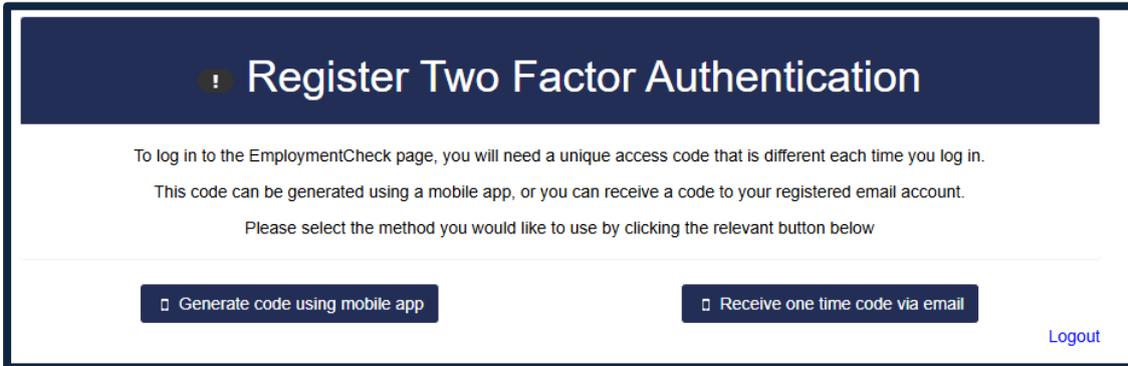

Fig 5. MFA Registration page.

To use the 'App' method, you will need to click on the 'Generate code using mobile app' option which will take you to the 'App Registration' page.
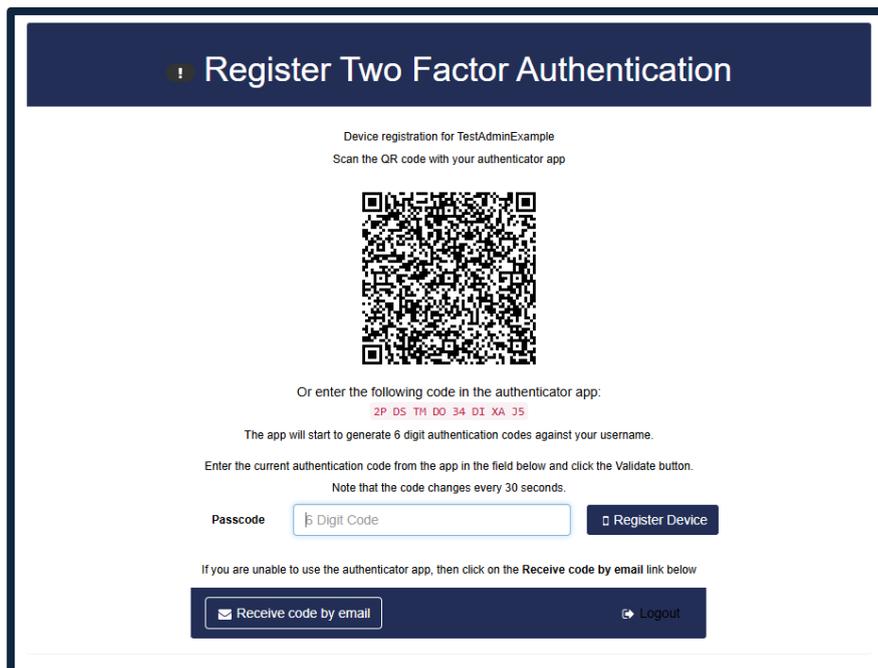

Fig 6. MFA App Route Registration page.

Then open the authenticator app on your smartphone device.

EmploymentChec**k.**

Cantium

> We recommend using 'Google Authenticator' or 'Microsoft Authenticator' but the functionality is compatible with any of the recognised authentication applications on either iOS or Android devices.

If you have used the authenticator app before, when you open the app, you'll see your existing accounts already linked to the authentication app.

There are two options to establish the link between the authentication app and the user account; either scan the QR code from the EmploymentCheck webpage or enter the setup key code from the EmploymentCheck webpage.

Once the device has been registered, you can then enter the OTP in the 'Passcode' field on EmploymentCheck.

After entering the OTP into the 'Passcode' field, then click on the 'Register Device' button.

Passcode	6 Digit Code	☐ Register Device

Fig 7. MFA Email Route – Passcode field.

You will then be presented with the EmploymentCheck Terms and Conditions for your user role(s). Accepting these terms will grant you access into the system.

> The Terms and Conditions are set by your organisation, most commonly these will provide a link to the organisation's Privacy Notice, ID Verification documentation information and other useful guidance.
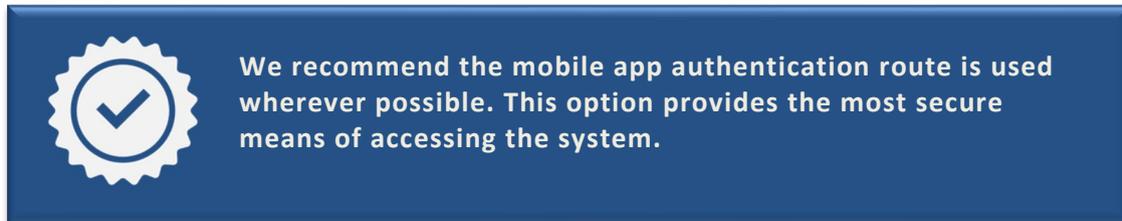
Once you have linked your account to the authentication app, you will be required to enter the OTP each time you need to access the EmploymentCheck system.

> The OTP code on the authentication app resets every 30 seconds, the system will only allow you to enter the same code once, else you will need to wait for a new code to be generated.
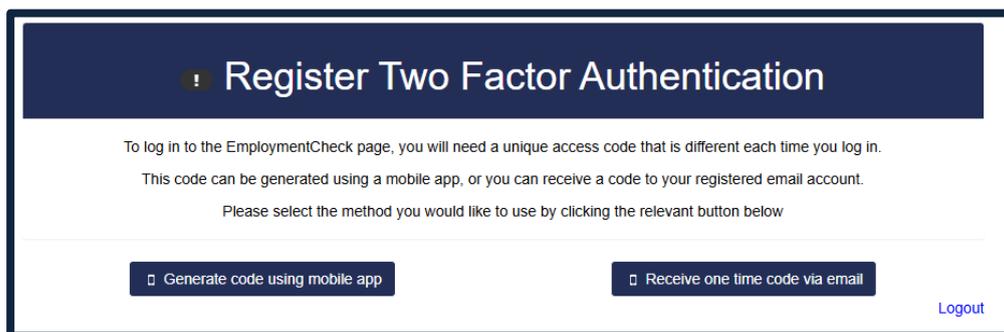
1.3.2 Email Code Method

For users who are unable to access/download the authentication app, an alternative email authentication route is available. This process will need to be completed each time you log into the system.

> We recommend the mobile app authentication route is used wherever possible. This option provides the most secure means of accessing the system.

When you have logged into the online DBS system, you will be presented with the below screen where you will need opt to receive the one-time code via email.

You will need to click on the 'Receive one time code via email' option.

Register Two Factor Authentication

To log in to the EmploymentCheck page, you will need a unique access code that is different each time you log in.

This code can be generated using a mobile app, or you can receive a code to your registered email account.

Please select the method you would like to use by clicking the relevant button below

⬚ Generate code using mobile app   ⬚ Receive one time code via email

Logout

Fig 8. MFA Email Route Registration page.

An automated email will be triggered by the system and will be sent to the email address registered against your account.

A confirmation message will be displayed onscreen.

Once the email has been received, you will need to click on the 'Login using email code' button.

One time email code has been sent to testadmin@cantium.solutions

⇥ Login using email code
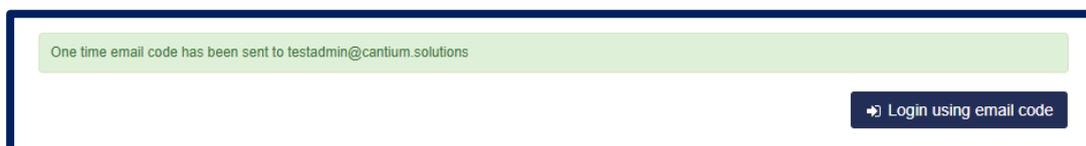
Fig 9. MFA Email Route Confirmation.

You will then be presented with the email OTP verification page as below.
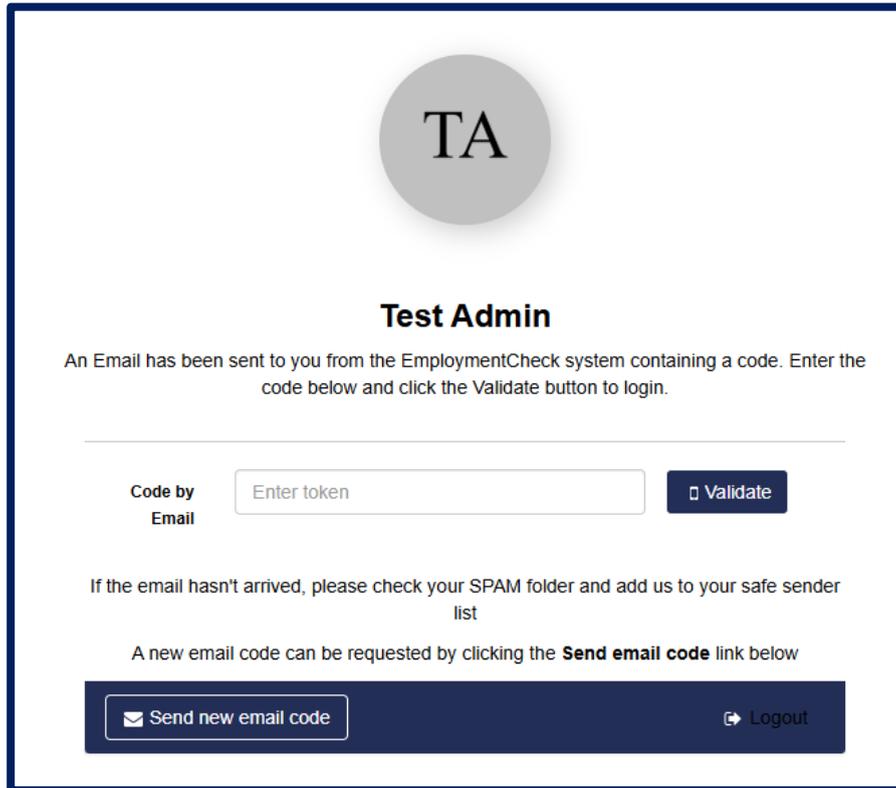
Fig 10. Enter MFA Email OTP Code.

You will need to enter the OTP code sent to your registered email address into the 'Code by Email' field.

Fig 11. Enter MFA Email OTP Code Field.

You will then need to click on the 'Validate' button. A new OTP code can be generated using the 'Send new email code' button.
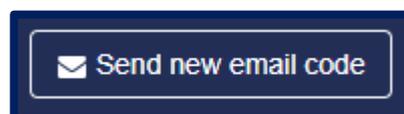
Fig 12. Send New MFA Email OTP Code Button.

If the email method is used, this process will need to be completed each time you need to access the online DBS system.

Please note that if you request multiple codes, only the most recent code will be valid. If the email has not been received, make sure to check your 'Junk'/'Spam' folders within your inbox.

You will then be presented with the EmploymentCheck Terms and Conditions for your user role(s).

Terms and Conditions for an Admin CS User

By selecting "Yes" and accessing the system you agree to the terms outlined in our Privacy Notice and confirm that:

- You will adhere to the DBS Checks guidance for employers to ensure you have assessed the role to be eligible under current legislation, correctly applied the right level of check, and correctly requested the appropriate barring list information;

- You will ensure you are legally entitled to request any DBS product being applied for. You will adhere to the Standard and Enhanced DBS checks DBS eligibility guidance;

- Your role as a counter-signatory is to verify that positions are eligible for the level of check requested prior to submitting them to the DBS. You will review eligibility prior to submitting, to ensure that administrators request for a Standard or Enhanced check meets the DBS eligibility criteria;

- You will not amend applicant data on their behalf and instead, will roll back the application to the applicant, for them to amend their own personal data;

- You will comply fully with the DBS Code of Practice;

- You will only access the system for administrative purposes.

- You will not validate your own applications for any DBS products.

Fig 13. Example Terms and Conditions.

Accepting these terms will grant you access into the system. To do this click on 'Yes' under the 'Accept All Terms and Conditions' heading.

Accept All Terms and Conditions

Yes   No

Fig 14. Accept Terms and Conditions buttons.

1.4. Forgotten passwords

If you've forgotten your password, you should click the 'Forgot my password' link on the 'Login' page below the username and password fields.

Fig 15. 'Forgot my password' link on 'Login' page.

You will then be prompted to enter your username and will need to click on the 'Request a reset' button. You will then receive an email with a secure link enabling you to access the system to change your password.
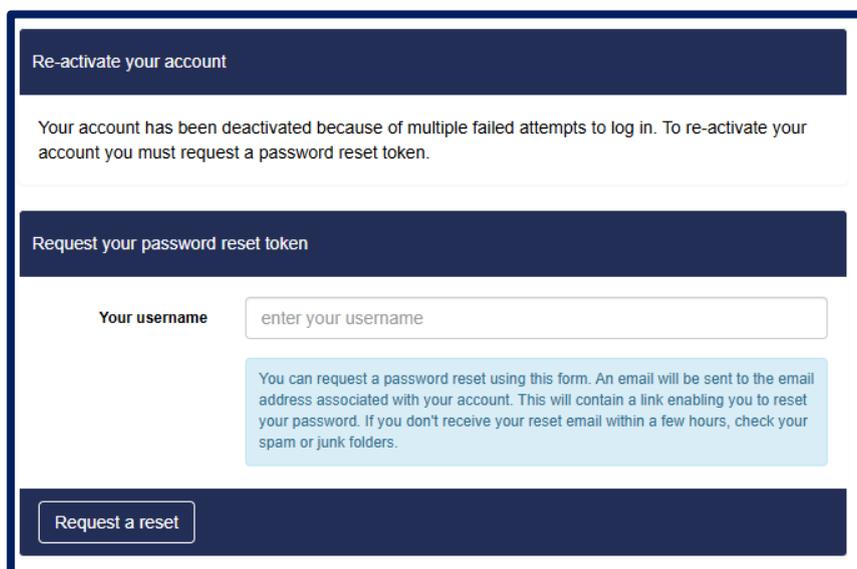
Fig 16. Forgot my password process – username field.

If your password is entered incorrectly three times, your access to the site will be revoked, and you will need to contact your administrator to reactivate the account.

1.5. Logging out of the system

To log out of the system, simply click on 'Logout' on the left-hand navigation panel.
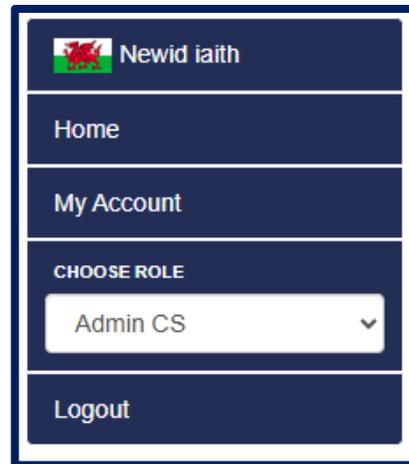
Fig 17. Logout Option.

2) User access levels

There are a variety of user levels available within the EmploymentCheck system which grant different privileges to users, these have been summarised in the table below:

User Type	User Actions
Applicant	• Edit own account details (forename, surname, password and contact email) • Complete the online application form • View applicant guidance
ID Verifier	• Edit own account details (forename, surname, password and contact email) • Complete ID verifications online for assigned applications • View ID verifier guidance
Admin	• Edit own account details (forename, surname, password and contact email) • Search and edit applications, users and ID verifiers for all business units under their Registered Body • Confirm receipt of a 'Certificate of Good Conduct' (CGC) • Create applications for all business units • Create ID verifiers for all business units
BU Admin	• Edit own account details (forename, surname, password and contact email) • Search and edit applications, applicants and ID verifiers for

	their business unit only • Limited ability to move applications to other statuses • Enter receipt of a 'Certificate of Good Conduct' (CGC) • Create applications for their own business unit only • Create ID verifiers for their own business unit only • Access the 'Application Dashboard', and view all applications for their own business unit only • View disclosure results for their own business unit only, including whether a disclosure has been returned with content • Run reports assigned to their business unit only
Admin+	• Edit own account details (forename, surname, password and contact email) • Search and edit applications, users and ID verifiers for all business units under their Registered Body • Edit the status of any application assigned under any business unit • Enter the outcome for 'Standalone Barred List' checks (should this functionality be enabled for the Registered Body) • Create applications for all business units • Create ID verifiers for all business units • Access the 'Application Dashboard', and view all applications under their Registered Body • View disclosure results for all checks under their Registered Body, including whether a disclosure has been returned with content • Run reports assigned to their Registered Body which will return results for all applications under all business units
Admin CS	• Countersign and e-Bulk disclosure applications • Edit own account details (forename, surname, password and contact email) • Search and edit applications, users and ID verifiers for all business units under their Registered Body • Change the status of multiple applications in bulk • Enter the outcome for 'Standalone Barred List' checks (should this functionality be enabled for the Registered Body) • Confirm receipt of a 'Certificate of Good Conduct' (CGC) • Create applications for all business units • Create ID Verifiers for all business units • Access the 'Application Dashboard', and view all applications under their Registered Body • View disclosure results for their Registered Body, including whether a disclosure has been returned with content • Run reports assigned to their Registered Body which will return results for all applications under all business units

2.1. Account Activation / Deactivation

For applicant and ID verifier accounts which have been made inactive, these can only be reactivated by admin users. For all admin level accounts, these can only be reactivated by 'Super Admin' users.

User type	User types who can activate / deactivate these accounts	How to activate / deactivate accounts
Applicant	'Admins' (for all applicants across all business units) 'BU Admin' (for applicants assigned to their business unit only)	Search for the applicant under the 'Manage Applicants' section and click the 'Edit' icon to edit the account. You can activate/deactivate the account by ticking/unticking the 'Access Revoked' box, then click 'Save'.
ID Verifier	'Admins' (for all ID verifiers across all business units) 'BU Admin' (for ID verifiers assigned to their business unit only)	Search for the ID verifier under the 'Manager ID Verifiers' section and click on the 'Edit' icon to edit the account. You can activate/deactivate the account by ticking/unticking the 'Access Revoked' box, then click 'Save ID Verifier'.

All administrative users ('Admin'/'BU Admin'/'Admin+'/'Admin CS') can set up disclosure applications on the system, however 'BU Admin' users are only able to do so for applicants from the business unit to which they are assigned.

Logging onto the system as an administrative user will bring up the 'Administration Panel', as shown below.

Please note that the navigation panel options visible will reflect the permissions associated with the type of administrative user account, as well as the site settings.

Fig 18. Navigation Panel – Management Tools.

2.2.   Editing Account Details

All users can edit their own account details including resetting their password. The 'Forename', 'Surname' and 'Contact Email Address' can be amended by clicking on the 'My Account' option from the navigation panel.

Passwords must be at least ten characters in length and contain characters from three of the following four categories:

5. Alphabetic uppercase characters (A through Z)
6. Alphabetic lowercase characters (a through z)
7. Numeric 10 digits (0 through 9)
8. Non-Alphabetic Characters (for example, $, #, %)
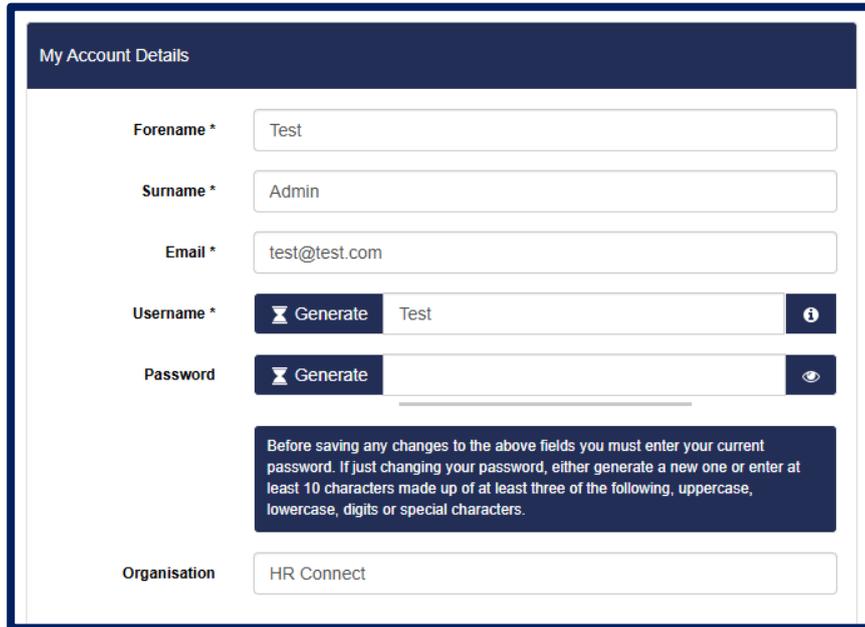
Fig 19. 'My Account' page.

2.3.   Updating Applicant Accounts

As an admin user, you can also reset applicant passwords, by selecting the 'Manage Applicants' option from the navigation panel, searching for the applicant's name and clicking on the pencil ('Edit') icon.
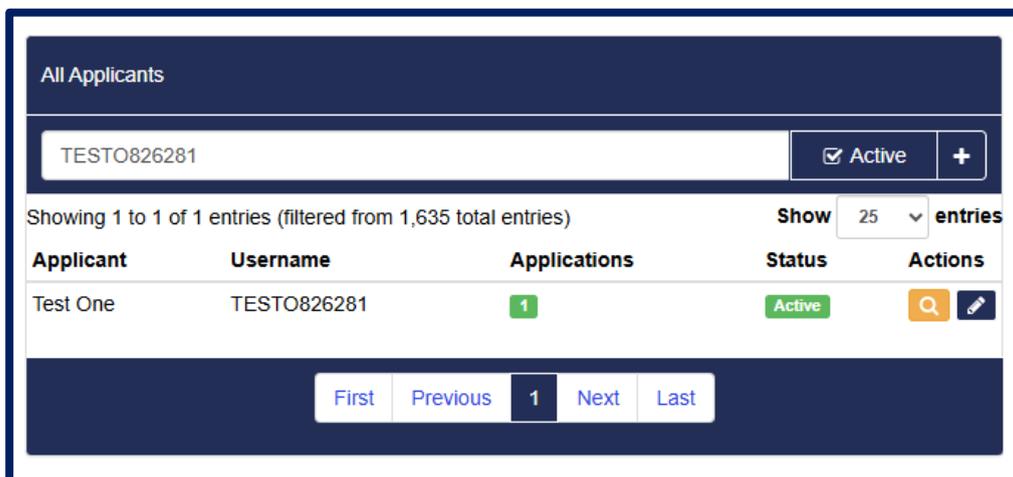
Fig 20. 'Manage Applicants' page – Reset Password

The details will need to be amended as required and then the user will need to click on the 'Save' button.

Please note that if an applicant has locked themselves out of their account, the administrator would also need to deselect the 'Access revoked' box.

Fig 21. 'Manage Applicants' page – Reset Password

The same process as above can be undertaken to reset ID verifier accounts from the 'Manage ID Verifiers' page.

3) Application Statuses

The following symbols are used throughout the system to indicate the status of each application – an overview of all checks can be viewed from the 'Application Dashboard'.

Symbol	Status	Description of Status
	Application Created by Admin (Draft)	If the admin user chooses to create a draft application by clicking on the 'Save As Draft' button when an application is being created, the check will enter this status. The account creation email will not be sent to the applicant.

		The check can be updated later and sent to the applicant from the 'Edit Application' page by clicking on the 'Save and Send' button. Clicking on this button will trigger the automated email to the applicant which contains their access credentials.
⏳	Waiting for Applicant to Fill in Details	Once an application has been created, the application enters the 'Waiting for Applicant to Fill in Details'. The check remains in this status until the applicant submits their section of the application form. Chase reminders are sent to the applicant whilst the check is in this status.
🕐	Awaiting ID Verification	When the applicant has completed their section of the application, an email is sent to the assigned ID verifier asking them to check complete the ID verification in line with DBS guidance. The check remains in this status until the ID verifier submits their section of the application form. Chase reminders are sent to the ID verifier whilst the check is in this status.
🪪	Awaiting Digital ID Check	For applications set to use the Digital ID route, when the applicant completes their section of the application, the check will enter this status to allow the applicant to complete a Digital ID check. The check remains in this status until the applicant completes their digital ID check. Chase reminders are sent to the applicant whilst the check is in this status.
📋	Ready for Processing	This status is used for applications which have been completed by the applicant and have been verified, these checks are ready for countersigning. The countersignatory will then countersign the checks via secure E-bulk to the DBS.
✔️	Application Submitted	Submitted applications move into this status once the countersigning process has been completed. After submission, the DBS will return a receipt which contains the e-form reference number. Receipts are loaded in hourly throughout the day.

		Once the receipt has been received from the DBS, the application status will be updated by the system to the 'Receipt Received' status.
✉	Receipt Received	This status confirms that the DBS have successfully received an application.
		The DBS check remains in this status until the disclosure result is returned from DBS.
		Whilst checks are in the 'Receipt Received' status, the integrated DBS tracking tool can be used to track the progress against the various stages of the DBS process. The tracking tool can be used from the 'Status View' page which is loaded by clicking on the status icon against any application. Clicking on the 'Refresh' button will run the tracking.
✉	Result Received	Disclosure results are received electronically and displayed in this status. A paper copy of the disclosure certificate is also sent to the applicant. Emails are automatically generated to the manager to notify them that the disclosure has been returned and to confirm whether there was content on the certificate.
		The DBS return two disclosure statuses; a clear disclosure will be returned with a disclosure status of 'Certificate contains no information'.
		A disclosure which contains content will be returned with a disclosure status of 'Please wait to view applicant certificate'.
		Any disclosures with content will be flagged with a '**P**' symbol when viewed from the 'View Applications' page.
		In all cases, the hardcopy certificate should be viewed by the hiring manager.
		Results are loaded into the system overnight each day.
📦	Application Archived	Once a recruitment decision has been made or a check withdrawn, the application can be archived. Checks can be archived from the 'Edit Application' page or in bulk from the 'Application Dashboard'.
		Once archived, the system will automatically purge any confidential information after 24 months in line with DBS requirements.

	Holding	This status is used to put applications on hold, for example in cases where an applicant is on long term leave. Applications can be moved here via the 'Edit Application' page and through the 'Application Dashboard' page by admin users.
	Hardcopy with DBS	This status is for hardcopy application forms where a paper application is completed. Applications may be placed here until the hardcopy results are returned, to ensure these records are included in reporting.
	Error	This status displays applications that have been rejected by the DBS. The error code describes the reason for rejection. The error reason can be viewed from the 'Status View' page which is loaded by clicking on the status icon against any application. Applications in this status generally require action from an admin user to correct the error, before the check can be resubmitted to the DBS.

4) System Icons

The following symbols are used throughout the system to indicate common functions:

Symbol	Description
+	Add/Expand
✏	Edit
🔍	History Log
❗	Tooltip
🏁	Run Report

- **Add/Expand** – this button can be used to load creation forms for applications and ID verifiers as well as to expand search fields to show additional filters.
- **Edit** – this button can be used to load edit forms for applications, applicants and ID verifiers.
- **History Log** – this button can be used to view the application history or user history for applications, applicants and ID verifiers.
- **Tooltip** – this button can be used for viewing tooltips on creation/completion forms.
- **Run Report** – this button is shown on the 'Reports' page and can be used to run reports.

5) Viewing All Applications

5.1. Application Search

To search for an application, click on 'Manage Applications' option from the navigation panel, and then click on the 'View Applications' option. This will display a list of all active applications on the system, with the applications ordered by date created. The newest applications will appear first. To search for a specific application, you can use the search field at the top of the page. The search bar can be used to filter applications via the following fields:

- Applicant Forename
- Applicant Surname
- Application ID
- Business Unit

Alternatively, you can click the search expander icon, and the fields will be expanded to display additional filters.

Fig 22. Expander Icon.

From the search expander, an admin user can use the additional filters below to search through applications. Multiple fields can be used together filter results.

- Date of Birth
- National Insurance Number
- Check Type
- Application Status
- Location
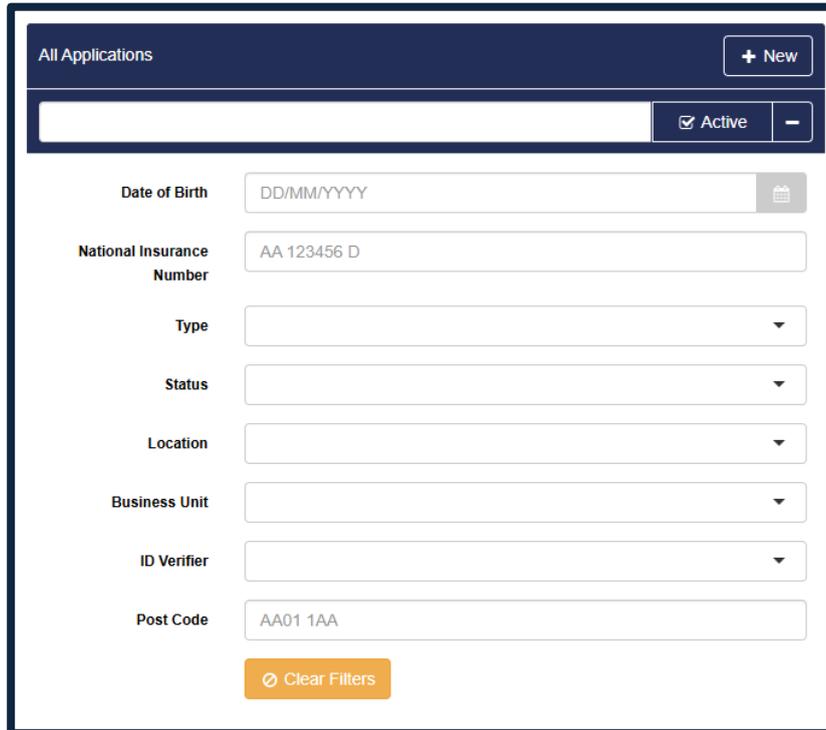- Business Unit
- ID Verifier
- Post Code

Fig 23. 'View Applications' page search expanders.

For 'BU Admin' users, the only search results displayed are for applications from the same business unit to which the 'BU Admin' user is assigned.

This will bring up all matching records, as illustrated in the example below:

Fig 24. 'View Applications' page search bar.

From this screen it is possible to perform the following actions:

- **Edit applications**. To edit the details on an application, click on the pencil symbol on the right-hand side of the page to load the 'Edit Application' page. Amendments can then be made to the application and can be saved by clicking the 'Update' button at the bottom of the form. All changes made to an application are saved into the application history.

- **Load the 'Edit Applicant' page to update the applicant account details.** To edit the applicant's user account details, click on the applicant's name, followed by the pencil icon.

- **View the 'Status View' page.** The 'Status' symbol e.g. ⌛ will display the status of the application. If the check is currently in the 'Receipt Received' status and is being processed the DBS, tracking of the application can be refreshed from the 'Status View' page here. If the disclosure result has been issued by the DBS, the disclosure details can be viewed here.

- **View additional information relating to the application by clicking on the expander symbol** ➕. This will show further details about the application such as the ID verifier or position.

- **View the application history.** Clicking on the magnifying glass icon 🔍 under the 'Actions' column will load the 'Application History' page for the application. This provides a time and author stamped record of each change of status, all applicant and ID verification information, details of the system-generated reminder emails which have been triggered for the application and details of when an administrator has added a note.
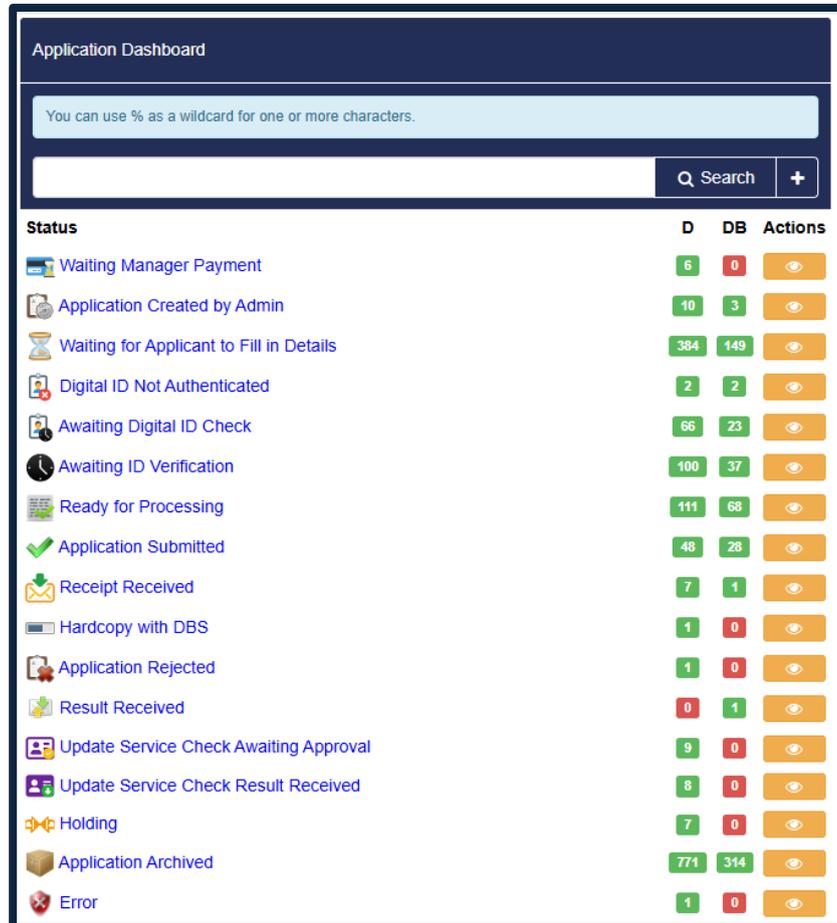

Fig 25. 'Application History' page.

5.2. Application Dashboard

To obtain a breakdown of all ongoing and complete applications in the system, click on the 'Application Dashboard' option from the navigation panel. This will load the following page, which lists the number of applications at each stage:

Fig 26. 'Application Dashboard' page.

To view a list of all applications currently at a particular stage, click on number icon against the appropriate status on the right-hand side. This will load all applications in the chosen status.

6) Creating Applications

6.1 Individual application creation

To manually create a new application, you can either:

- Click the 'Manage Applications' option from the navigation panel, this will load up the 'View Applications' page displaying a list of applications. Then click on the '+ New' button at the top of the page.

All Applications | + New

☑ Active | +

Fig 27. 'View Applications' page – 'Create New Application' button.

- Click on the 'Create New Application' option directly from the navigation panel under the 'Manage Applications' sub-heading.
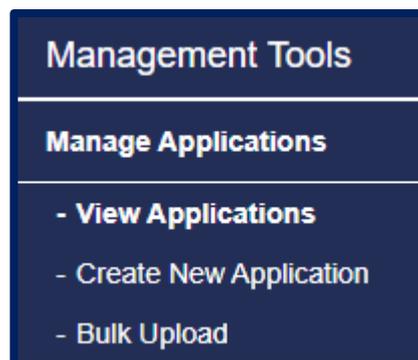

Management Tools

Manage Applications

- View Applications
- Create New Application
- Bulk Upload

Fig 28. Navigation panel – 'Manage Applications' options.

Both methods will bring up the 'Create Application' page as below. All the mandatory fields (denoted with an *) will need to be completed to allow the application to be created. Validation will be enforced upon saving the form if there are any errors present. Erroneous fields will be highlighted in red, and a validation message will be displayed at the top of the page outlining the error details.

The applicant details will need to be entered, including their forename, surname, a username (which can be generated by the system using the 'generate' button), a password (which can be generated by the system using the 'generate' button) and their email address.

The 'Workforce' field is a mandatory drop-down field with the following options, 'Child Workforce', 'Adult Workforce', 'Child and Adult Workforce', 'Other Workforce'. This entry will be added to the position title to make up the final position data submitted to the DBS.

The 'Volunteer' field will need to be completed if the applicant meets the DBS criteria to be classed as a volunteer for Standard/Enhanced applications.

Fig 29. 'Create New Application' form – applicant Details.

The 'Business Unit', 'ID Verifier', 'Organisation' and 'Position' will then need to be entered for the applicant.

'BU Admins' will have the 'Business Unit' field pre-populated based on the BU to which they are assigned. The list of ID verifiers will also be limited to those assigned to the same business unit as the 'BU Admin'.

If the 'Organisation' (as it will appear on the disclosure certificate) is the same as the 'Business Unit', you can click on the 'Copy to Organisation' button which will copy the business unit name into the 'Organisation' field.

Fig 30. 'Create New Application' form – business unit details.

The 'Manager Details' section can be used to record the individual who should be notified of the disclosure result – automated emails will be sent to this email address containing details of the DBS check result. If this is the same person as the ID verifier, you can click on the 'Copy to Manager' button to transfer the ID verifier details to the fields below.

Fig 31. 'Create New Application' form – Manager Details.

Additional email addresses can be added to receive the emails sent to the manager, you can add up to three additional CC manager emails.
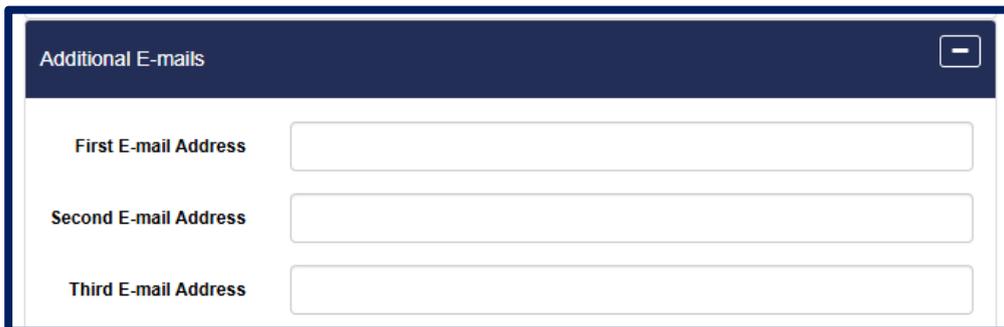
Fig 32. 'Create New Application' form – Additional Emails.

An 'Email Group' will need to be selected from the drop-down list provided, this selection will determine which email notifications are sent throughout the application process.

Email groups and their templates can only be amended by 'Super Admin' users.
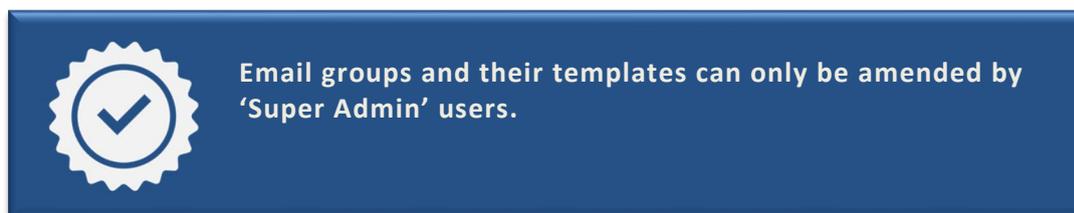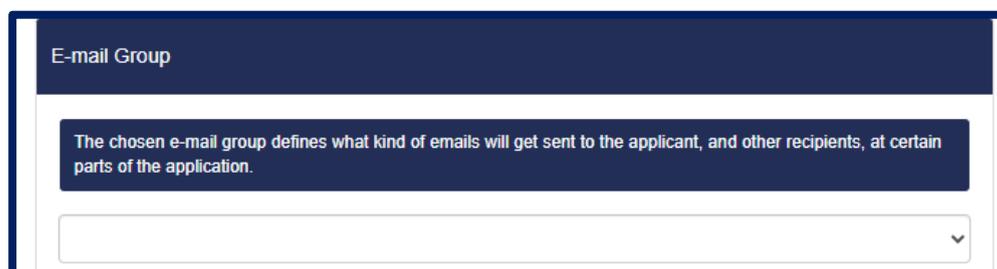
Fig 33. 'Create New Application' form – Email Group.

The 'Additional Information' section of the form allows the admin user to specify the 'Disclosure Level and set 'Barred List' options via the radio buttons.

The default settings for the DBS eligibility are 'Enhanced' with both 'Barred List' options set to 'No'. You must update these accordingly prior to submitting the form. If you are unsure, you should refer to the DBS eligibility guidance or contact your DBS support team.

There is also the option to add a cost code to the application, the 'Cost Code' field will be displayed once the 'Administration Fee' field is set to 'Yes'. These fields can be extracted via reports.

The 'Working from Home' option is linked to the type of application. For standard applications this will default to 'No', for enhanced you must choose if the applicant is working from home.
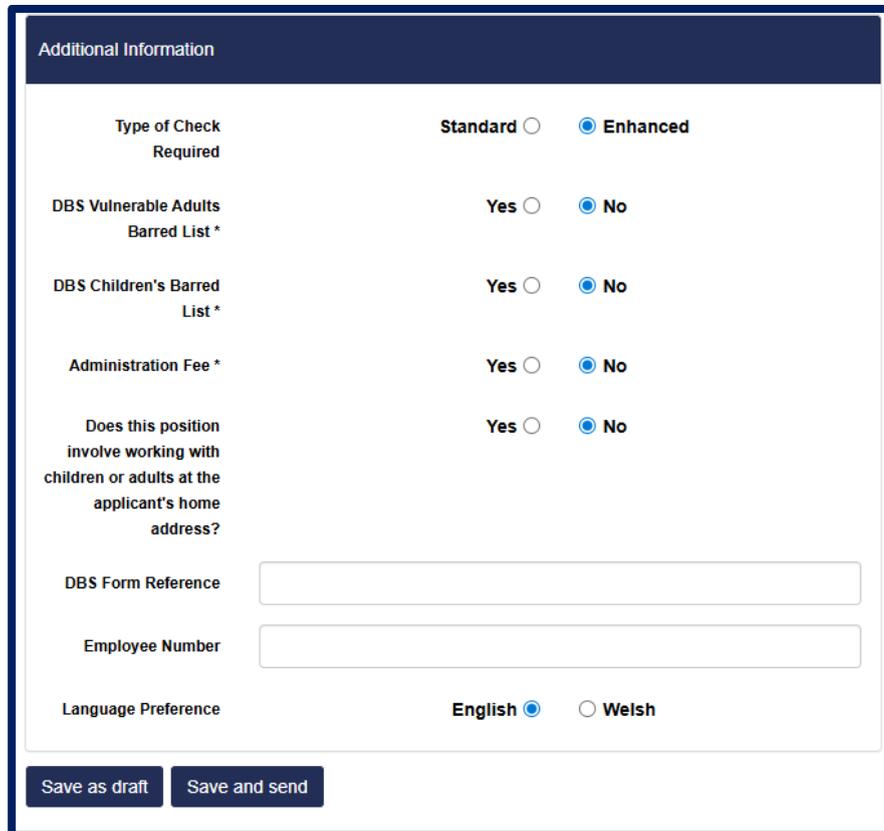
Additional Information

Type of Check Required	Standard ○	● Enhanced
DBS Vulnerable Adults Barred List *	Yes ○	● No
DBS Children's Barred List *	Yes ○	● No
Administration Fee *	Yes ○	● No
Does this position involve working with children or adults at the applicant's home address?	Yes ○	● No
DBS Form Reference		
Employee Number		
Language Preference	English ●	○ Welsh

Save as draft   Save and send

Fig 34. 'Create New Application' form – Additional Information.

Once all mandatory fields have been completed, click on the 'Save and Send' button at the bottom of the form. A confirmation message will be displayed to confirm that the applicant has been successfully set up. This process will also trigger an automated email to the applicant, providing their log-in details.

There is also the option to 'Save as Draft', should you wish to come back to the application and send this to the applicant later. If the application is saved as a draft, the account creation email will not be triggered by the system.

6.1.   Setting Up Applications to Use Digital ID

> The following option is available as chargeable configuration, please contact your representative if you would like this option activated.
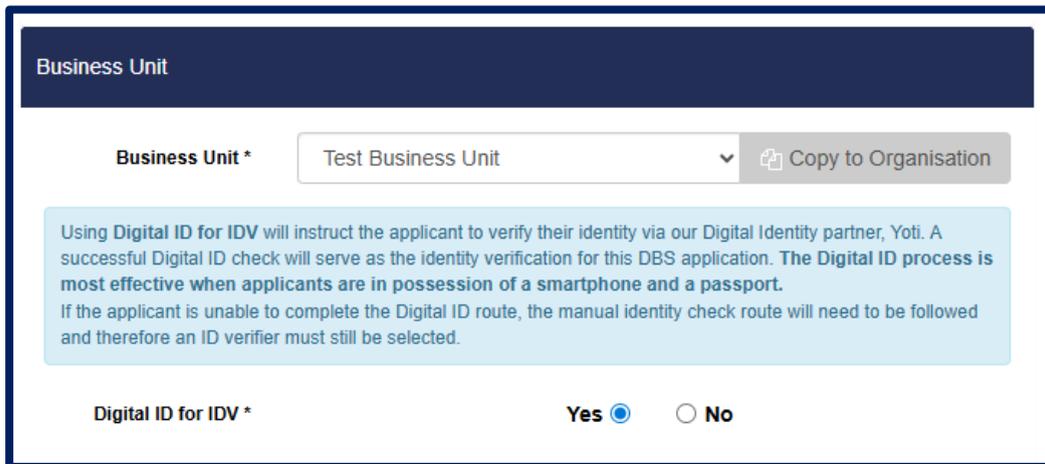
EmploymentChec✓.

Applications can be set to use the Digital ID functionality during the creation process. Digital ID offers the quickest, easiest and most trustworthy means of conducting the verification of DBS applicants. The EmploymentCheck solution is integrated with Yoti Ltd. to provide a market leading Digital Identity solution.

The option is configurable on an application-by-application basis. For business units where the Digital ID option is in use, the setting will default to 'Yes' when applications are being created. An admin user can override this if necessary.

Applicants can use Digital ID to conduct the verification of their identity documents within a few minutes.

Fig 35. 'Create New Application' form – 'Additional Information' section.

6.2. Auto Renewal Date Functionality

> The following option is available as a free of charge configuration, please contact your representative if you would like this option activated.

It's possible to use automated renewal date functionality to record the renewal date against an application. This is a configurable option and must be enabled by the Registered Body. Once enabled. The renewal date period can be set by business unit. An automated process will then calculate the renewal date based on the disclosure issue date + the auto renewal timeframe set against the business unit.

When disclosure results are returned from the DBS, the system will calculate the renewal date and save this against this application. This information can be exported from the system to be saved against the employee's HR record via reporting tools. Reports can also be used to identify applications where there is an upcoming renewal.

EmploymentChec✓.

7) Application Bulk Upload

The 'Application Bulk Upload' facility enables high volumes of DBS applications to be set up on the system via a single action, saving administration time and improving data quality by reducing the need to manually key in data.

To use the 'Application Bulk Upload' functionality, select the 'Manage Applications' tab from the navigation panel and then click on the 'Bulk Upload' tab.
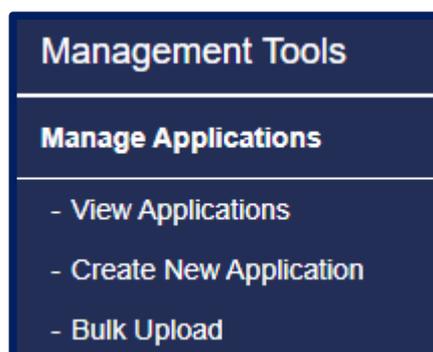

Management Tools

Manage Applications

- View Applications

- Create New Application

- Bulk Upload

Fig 36. Navigation panel – 'Bulk Upload' option.

From the 'Bulk Upload' page, a template CSV file can be downloaded from the system by clicking on the 'Download DBS Template' button. The file can be saved locally, ready to be populated with the relevant information. The required fields to initiate a check will appear as column headings, with asterisks indicating mandatory fields.

Up to 250 applications can be created using a single CSV file using this method.

	A	B	C	D	E	F	G	H	I	J	K	L
	User Nam	* Forenan	* Surname	* Email	* Organisa	* Position	* ID Verifi	* Manage	* Manage	* Manage	* Business	Team
2	(Valid Exis	(Text)	(Text)	(Valid Em	(Text)	(Text)	(Valid ID \	(Text)	(Text)	(Valid Em	(Valid Bus	(Text)
3	Example0	John	Smith	Applicant	Test Orgar	Teacher	IDVerifier	Jane	Doe	Manager@	Test Busin	Test Tea

Fig 37. 'Application Bulk Upload' CSV template example.

The Standard/Enhanced fields which can be completed in order to set up applications are as follows (mandatory fields marked with an asterisk), a separate file exists for DBS Basic checks:

Field	Guidance
* Username	Applicant Username
* Forename	Applicant Forename
* Surname	Applicant Surname
* Email	Applicant Email Address
* Organisation	Applicant Organisation
* Position	Applicant Position
* ID Verifier Username	**Can be used with the Digital ID functionality, if enabled the Digital ID option will default to 'Yes' when the bulk upload is used.**
* Manager Forename	

* Manager Surname	
* Manager Email	
* Business Unit Name	
Team	
Location	
* Email Group	Valid Email Group Name
Admin Fee	
Cost Code	
Charge	
Employee Number	
Extra Email 1	
Extra Email 2	
Extra Email 3	
* Workforce	
* Volunteer	Yes/No
* Disclosure Type	Either 'Standard' or 'Enhanced'
*DBS Vulnerable Adults Barred List	Whether a check of the vulnerable adults barred list should be included as part of a check. In format 'Yes'/'No'.
* DBS Children Barred List	Whether a check of the children's barred list should be included as part of a check. In format 'Yes'/'No'.
* Working at Home Address	'Yes'/'No'
DBS Form Reference	
* Submit	

When the bulk upload file is processed, applicants will be emailed their login credentials by the system.

If the upload cannot upload any rows on the file, a validation message will be displayed on screen indicating the fields which need to be amended enabling invalid records to be identified and corrected.

A report can be downloaded with this information once the upload has been completed by clicking on the 'Processed' button from the 'Bulk Upload' page and then downloading the 'Report with Errors'.

8) Editing Applications

Admin users can access the 'Edit Application' page by clicking on the 'edit' (pencil) icon under the 'Actions' column from the 'View Applications' page or from the 'Application Dashboard'.

An admin can update any of the fields relating to the application, including updating the DBS eligibility fields such as the disclosure level, workforce or barred list.

> **Please note that changes will only be effective before a check has been submitted to the DBS via E-bulk. Once the check has been counter-signed, no further amendments can be made as the application will already be in progress with the DBS.**

The status of applications can be updated via a dropdown menu at the bottom of the page as shown below:
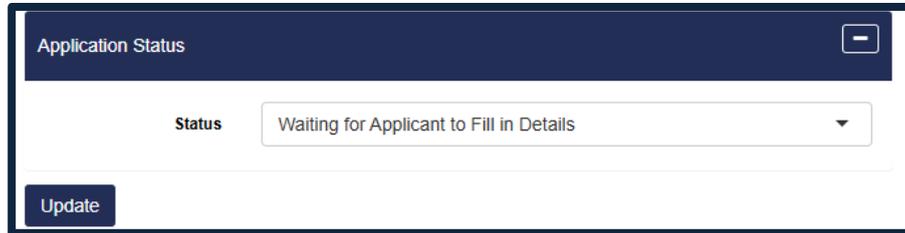
Application Status	[−]
Status	Waiting for Applicant to Fill in Details ▼
Update	

Fig 38. 'Edit Application' page – change status.

Please note that whilst 'Admin+' and 'Admin CS' users can move checks into all other statuses, 'BU Admins' can only move checks into a limited selection of statuses depending on the current status of the application.

Once changes have been made, the admin user should click on the 'Update Application' button at the bottom of the screen to save the application.

> The ID verification process should not be verified via the 'Edit Application' screen. If you have administrative users who are also ID Verifiers, they must use their ID Verifier account when verifying ID.

8.1.   Read Only Edit Page Functionality

> The following option is available as a free of charge configuration, please contact your representative if you would like this option activated.

The 'Read Only Edit Page' functionality allows organisation to restrict 'BU Admins' from making changes to applications after creation. With the setting enabled, applications can be created but no updates can be made to the application by any 'BU Admin' users. If details need to be updated, the organisation will need to contact their Support Team to action the required changes.

The 'Read Only Edit Page' functionality is designed as a view only option.

There is also a configurable option to prevent 'BU Admins' from creating applications

– please contact your representative if you'd like further details regarding this.

> ✓ The functionality hides the 'Update' button from the 'Edit Application' page to prevent updates by 'BU Admins'. This functionality only restricts access for 'BU Admin' users.

8.2. Adding Notes Against Applications

Admins can add notes against applications using the 'Add Note' button from within the 'Application History' page. This can be a useful tool for assisting in the management of an application e.g. explaining why a check was delayed or cancelled.

> ✓ Please be aware that any notes added by an 'Admin +' or 'Admin CS' user can be seen by 'BU Admin' users and vice versa.

Application History for 20-2967 (showing 10 of 10)

	Timestamp	Log Entry	User
+	2025-07-29 16:12:55	Email trigger point activated	System
	2025-07-29 16:12:55	Ready for Processing	System
+	2025-07-29 16:12:54	Application updated by ID Verifier	TestAdminExample
+	2025-07-29 16:11:22	Email trigger point activated	System
	2025-07-29 16:11:22	Awaiting ID Verification	System
+	2025-07-29 16:11:21	Confirmation page updated by Applicant	APPLT209542
+	2025-07-29 16:11:14	Details page updated by Applicant	APPLT209542
	2025-07-29 16:09:39	Waiting for Applicant to Fill in Details	System
+	2025-07-29 16:09:39	Email trigger point activated	System
+	2025-07-29 16:09:39	Application updated by Admin	TestAdminExample

Note	Add Note

Fig 39. Application History.

Notes can also be added to the application history from the 'Edit Application' page. This field is located within the 'Additional Information' section and can be saved by clicking on the 'Update' button at the bottom of the page.

Notes

Fig 40. Application History – 'Notes' field.

8.3.   Putting Applications on Hold

In cases where the completion of an application may be legitimately delayed (or where an off-system process is required), it is possible to change the status of an application to 'Holding' via the 'Application Status' dropdown on the 'Edit Application' screen. This will pause the application process and the automated reminder emails.
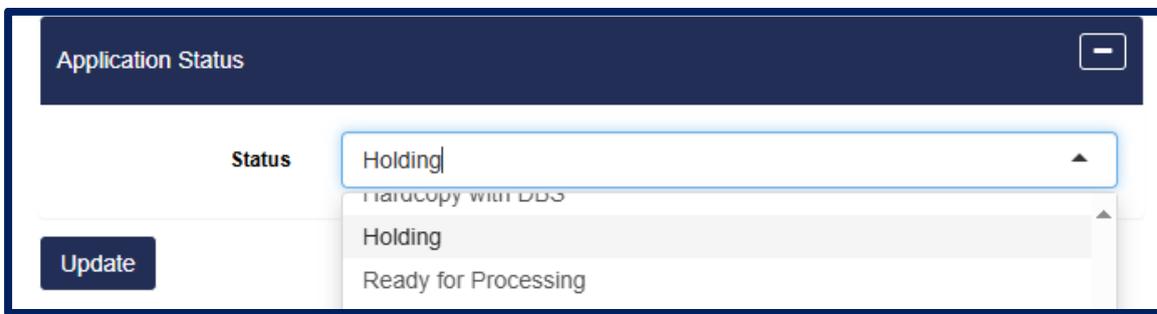

Application Status

Status   Holding

Hardcopy with DBS

Holding

Ready for Processing

Update

Fig 41. 'Edit Application' page – 'Holding' status.

To view a list of applications in holding, select the 'Application Dashboard' from the navigation panel, then select the 'Holding' status icon (   ).

9) ID Verifier Management

9.1.   Viewing ID Verifiers

You can search for ID verifiers on the system by selecting 'Manage ID Verifiers' from the navigation panel on the left-hand side and then choosing the 'View ID Verifier' option.

Manage ID Verifiers

- View ID Verifiers

- View ID Verifier Teams

Fig 42. Navigation panel – 'Manage ID Verifiers'.

Please note that for 'BU Admin' users, the only search results that are brought up are for ID verifier accounts from the same business unit to which the 'BU Admin' is assigned.

To search for a specific ID verifier, an admin user can use the search field at the top of the page and enter their 'Forename' or 'Surname'. Alternatively, the expander icon can be used to show additional search criteria if required.
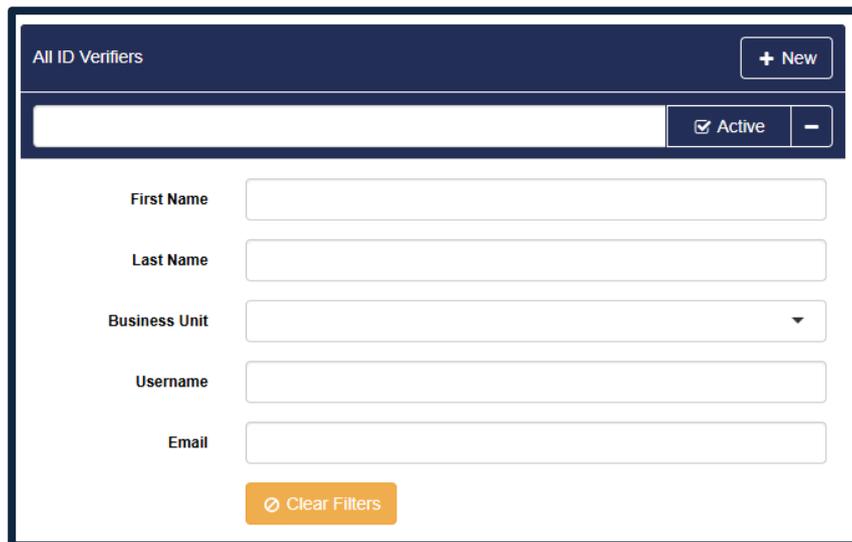
Fig 43. ID verifier search expanders.

You can tick and untick the 'Active' box, to search for 'Active' or 'Inactive' ID verifiers.

Fig 44. ID verifier active field.

To edit the ID verifier's account details, click on 'Edit' symbol.

Fig 45. ID verifier – 'Edit' icon

Fig 46. 'Edit ID Verifier' page.

To view a list of applications assigned to the ID verifier, click the number icon under the 'Applications' column. This will bring up a list of the applications which have been or are assigned to this ID verifier.

Fig 47. View applications assigned to ID verifier icon.

9.2.   Creating ID Verifiers

If the ID verifier is not set up on the system, the user account will need to be created prior to the DBS application being initiated. To check whether an ID verifier has already been set up on the system, click on 'Manage ID Verifiers' option from navigation panel, in the search bar enter the name of the individual and press enter.
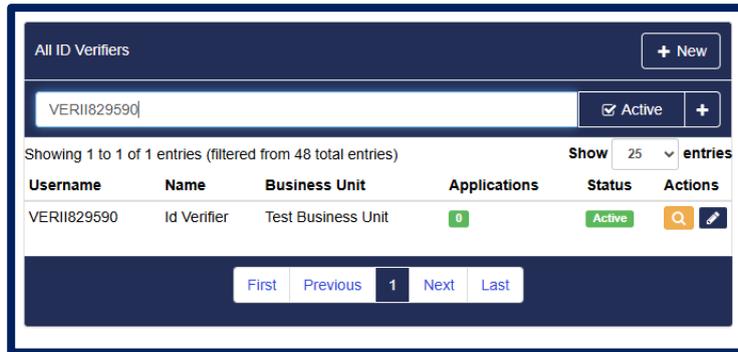
Fig 48. 'View ID Verifiers' page – search field.

If no account is found, then a new account will need to be created to allow the user to perform the ID verification of applications.

To set up an ID verifier, click '+ New' button at the top of the page. You will need to complete the fields marked as mandatory (denoted by an asterisk) as a minimum.

Clicking on 'Generate' buttons will generate a default username or password.
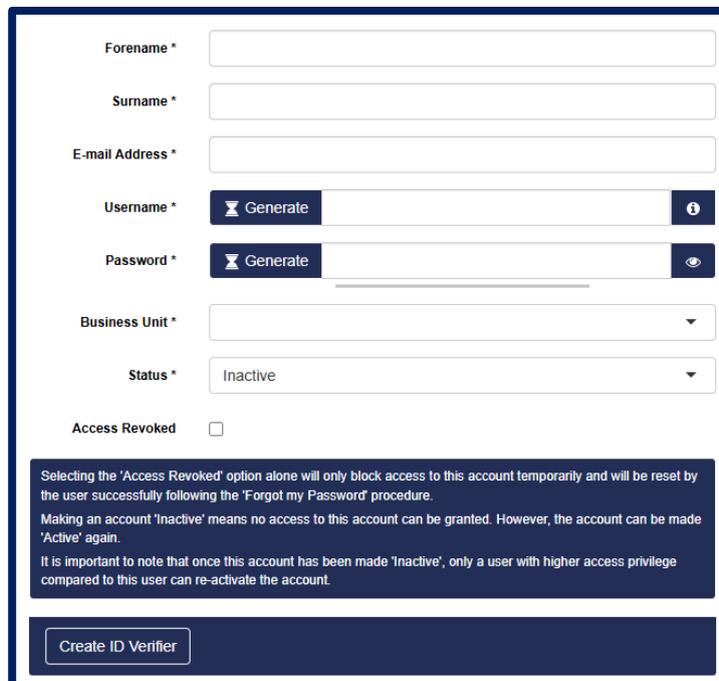
Fig 49. 'Create New ID Verifier' page.

Once the required fields have been completed, click the 'Create ID Verifier' button at the bottom of the form to create the ID verifier account. This will generate an automated email from the system to the ID verifier, notifying them of their login details. A message will also appear on-screen to indicate that the account has been successfully set-up.

> **Please note that when adding an ID verifier as an admin user, you should select which business unit you would like the ID verifier to be assigned to. If an ID verifier is set up by a 'BU Admin' user, they will only be able to verify ID for checks for that specific business unit. 'Super Admin' users can also create multi-access accounts to give a user 'BU Admin' and ID verifier access.**

9.3.   ID Verifier Team Functionality

> **The following option is available as a free of charge configuration, please contact your representative if you would like this option activated.**

The 'ID Verifier Team' functionality allows groups of ID verifiers to operate as a team. Checks can then be assigned to this team during the creation of applications. The checks will then be available to all ID verifiers within that team to verify.

ID verifiers can view all applications assigned to the 'ID Verifier Team' and can assign applications from the team and assign into their own 'Pending Applications' lists when ready to do so, maintaining the DBS requirement that a single ID verifier must assume responsibility for the ID verification of an application.

9.2.1 Creating an ID Verification Team

The 'ID Verifier Teams' functionality can be accessed by clicking on the 'View ID Verifier Teams' option from the navigation panel. This can be accessed by hovering over the 'Manage ID Verifiers' option.
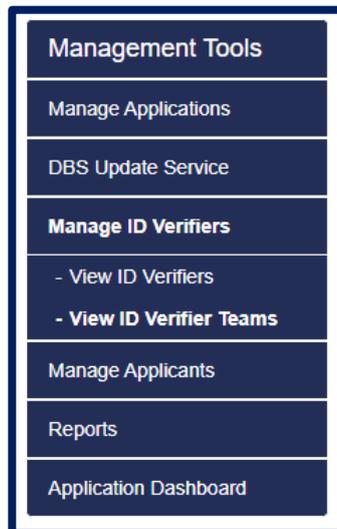
Fig 50. Navigation panel – 'View ID Verifier Teams' option.

To create a new ID verifier team, click on the 'View ID Verifier Teams' option from the navigation panel and then click on the '+ New' button.

Fig 51. 'View ID Verifier Teams' page – search field.

This will then allow you to create your new ID verifier team. You will be asked to set an IDV team name and an email address where the ID verification requests and chase emails will be sent to (this is likely to be a shared mailbox).

The IDV team should be assigned to a business unit, this will limit the ID verifiers that can belong to the ID verifier team.

9.2.2 Assigning Applications to IDV Teams

When creating an application from the 'Create New Application' page, an 'ID Verifier Type' will be displayed from within the 'Business Unit' section. This field gives the option to choose between 'Individual' and 'Team' IDV types.

The default option will be 'Individual'.

Fig 52. 'Create New Application' page – selecting an ID verifier team.

If the 'Individual' option is selected, then the user can select from the dropdown list of individual ID verifiers, however if the 'Team' is selected, then a list of available IDV teams will be displayed.

Please note that selecting IDV team will also disable the 'Copy to Manager' function as an IDV team cannot be entered as a manager.
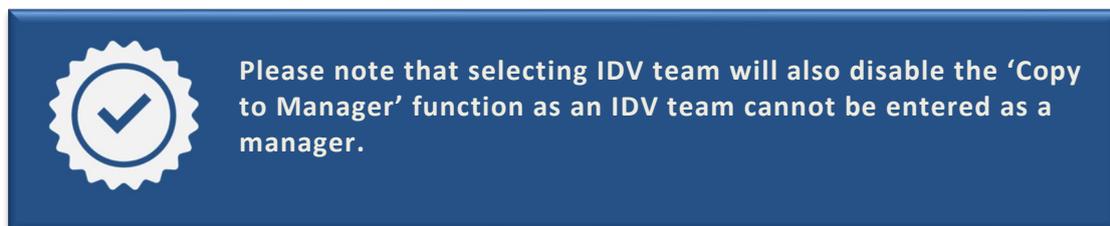
'Admin', 'Admin +' and 'Admin CS' accounts will always have both individual and team options displayed whilst team ID verification is active, however BU Admins can have the IDV team option disabled via their BU configuration.

9.2.3 ID Verifying IDV Team Applications

For applications assigned to an ID verifier team, when the check is ready for verification, the 'ID Verification Request' email will be sent to the email address recorded against the IDV team.

When an ID verifier who belongs to the relevant team logs in and navigates to their 'Pending Applications' page they will be able to view applications assigned to their IDV team which are in the 'Awaiting ID Verification' status.

The user can then click on the 'Assign' button to take ownership of the selected application. The application will then be show in the 'Applications to Verify' table at the top of the page.

The application will no longer appear in the list for any other ID verifiers. The application has from this point forward been accepted by the assigned ID verifier and any submission made from this point forward is the responsibility of that ID verifier in the normal way.

If any application is required to be returned to the central IDV team pool of applications, this must be actioned by an admin level user via the 'Edit Application' page.

Applications Assigned to ID Verifier Team			
Name	**Status**	**Type**	**Actions**
John Smith (JOHNS203474)	Awaiting ID Verification	DBS	⊕
James Smith (JAMES204815)	Awaiting ID Verification	DBS	⊕
June Smith (JUNES207558)	Awaiting ID Verification	DBS	⊕
Julie Smith (JULIS209956)	Awaiting ID Verification	DBS	⊕
Julia Smith (JULIS208678)	Awaiting ID Verification	DBS	⊕
Jim Smith (JIM9S205004)	Awaiting ID Verification	DBS	⊕
Jerry Smith (JERRS203223)	Awaiting ID Verification	DBS	⊕

Fig 53. Applications assigned to ID verifier team.

10) Automated Reminders for incomplete applications

Applicants and ID verifiers are asked to complete their respective elements of the DBS application process promptly to avoid delays processing their application which could ultimately impact the employee's start date.

Automated reminders can be configured for applicants and ID verifiers to prompt users to complete their section of the online form. Reminders will be sent until the application status is updated.

Confirmation of the chase reminders sent to each applicant can be viewed in the application history for each check.

11) E-bulk Applications Being Queried

> The following option is available as a free of charge configuration, please contact your representative if you would like this option activated.

For applications where there is a query raised e.g. to confirm the correct DBS eligibility, the 'E-bulk query on hold' setting can be used to record that the check is being queried, this will prevent the check from being countersigned to the DBS.

The 'E-bulk Query on Hold' radio button field appears on the 'Edit Application' page against DBS Standard/Enhanced and DBS Basic applications in the 'Ready for Processing' status.

Ebulk Query on Hold	Yes ○ ◉ No

Fig 54. 'Ebulk Query on Hold' setting.

An admin user can mark the check as being on hold which will trigger an automated email and remove the ability of the countersignatory to submit the application to the DBS.

Once the query has been resolved, the field can be set back to 'No' and the check can be countersigned as normal.

12) Countersigning Applications

To be able to countersign and submit completed applications to the DBS for processing via secure e-Bulk, you will need to be an authorised countersignatory for your registered body and have the 'Admin CS' user role assigned to your account on the system.

Your 11-digit CS number will need to be added to your 'Admin CS' account for you to start countersigning. The 'Send' button which is present from the 'Application Dashboard' for applications in the 'Ready for Processing Status' will only be visible if the 11-digit number has been added against your account.

To begin countersigning completed applications to the DBS, click on the 'Application Dashboard' option from the navigation panel.
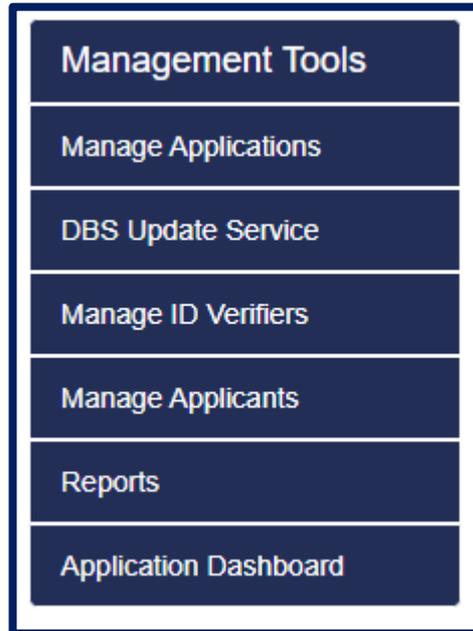
Fig 55. Navigation panel – 'Application Dashboard' option.

Then click on the 'Ready for Processing' status, as shown below:

Fig 56. 'Application Dashboard' view.

Applications that are ready to be countersigned will then be displayed in a list. You can order the applications based on when they entered the current status by using the sort by filter at the top of the page.
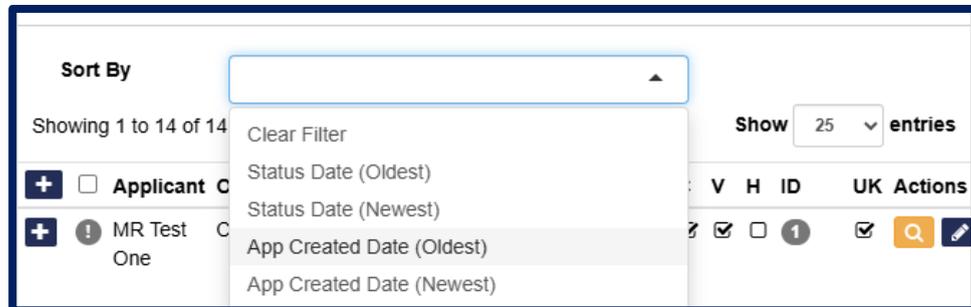
Fig 57. 'Application Dashboard' – sort by filter.

Key information about the check is also displayed including:

Field	Explanation
Organisation	The applicant's organisation
Position	The applicant's position and workforce combined
T (Disclosure Type/Level)	Whether the check level is standard (S) or enhanced (E)
A (Adult Barred List Status)	Whether the adult's barred list is being checked as part of the application
C (Child Barred List Status)	Whether the children's barred list is being checked as part of the application
V (Volunteer Status)	Whether the application is for a volunteer (according to the DBS definition)
H (Working from Home Address Status)	Whether the application has indicated they are working from home
BL (Separate Barred List undertaken)	Whether an additional standalone Barred List check has been requested (provided this functionality is enabled for your RB)
ID	The ID Route via which the application was completed (1,2,3 or blank)

The application details can be viewed by clicking on the 'Edit' (pencil) icon.

The full application history can be viewed by clicking on the magnifying glass symbol.
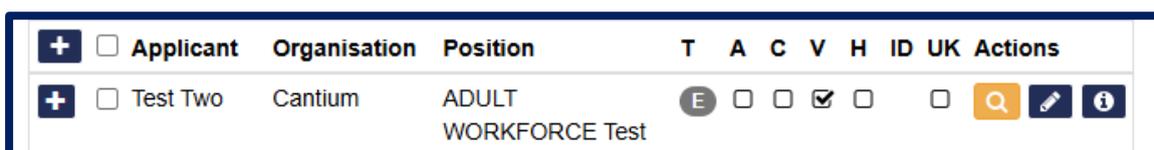
Fig 58. 'Application Dashboard' – application list.

Within this screen, a tick box is available (with an 'All' or 'None' option) to select applications on the page, additionally you can change the status, archive or put the selected applications on hold.

Before e-Bulking, a countersignatory should ensure that the selected disclosure type, workforce, volunteer and barred lists are appropriate for the position. If there are any concerns over the eligibility of a role and the level of check requested, this must be clarified before the application is e-Bulked. To amend of the details, click on the pencil icon, make necessary amendments and click 'Update'. When you return to the e-Bulk screen the updated information will show to allow the check to be e-Bulked.

Once the DBS eligibility has been confirmed, selected applications can be e-Bulked by selecting the relevant applications using the tick boxes on the left-hand side, scrolling to the bottom of the page and clicking on the 'Send' button.

Once this has been done an on-screen confirmation and the applications which have been e-Bulked will be displayed.

> **Please note that changes will only be effective before a check has been submitted to the DBS via E-bulk. Once the check has been countersigned, no further amendments can be made as the application will already be in progress with the DBS.**

12.1. BU Admin ability to countersign DBS Applications

> **The following option is available as a free of charge configuration, please contact your representative if you would like this option activated.**

There is a configurable option available to allow 'BU Admins' who are registered with the DBS to undertake the role of a countersignatory for their business unit only.

This allows for 'Super Admin' users to assign DBS countersignatory numbers to 'BU Admin' accounts.

Please contact your representative if you would like to utilise this free of charge functionality.

12.2 Requesting and Recording Standalone Barred List checks

> The following option is available as a free of charge configuration, please contact your representative if you would like this option activated.

For individuals working in a regulated activity with children or adults, a check of the DBS Barred List is included as part of an enhanced DBS check provided the 'Admin'/'BU Admin'/'Admin+'/'Admin CS' user setting up the check selects 'Yes' for the relevant barred list option on the 'Create New Application' form.

However, if a separate, additional barred list check is required before the full DBS disclosure has been received this can be requested by selecting 'Yes' on the 'Separate Barred List Required' option when adding an application.

> Please note that the DBS don't allow separate barred lists to be processed through E-Broker systems. These checks need to be processed by an authorised individual for your registered body.

Where an administrator has requested an additional, separate barred list check alongside an enhanced DBS check, this will be denoted on the 'Ready for Processing' menu in the BL column. Please note that this column will only display if the separate barred list check functionality has been enabled for your Registered Body.

To enter the result of an additional, separate barred list check, the authorised user should use the 'Barred List Status' field on the 'Edit Application' page. Selecting 'No match' will trigger an automated email to the nominated manager to confirm clearance and the timestamp of the check. Only authorised 'Admin+' and 'Admin CS' users can update the 'Barred List Check' Status. This option will only appear where such a check has been requested alongside an application.
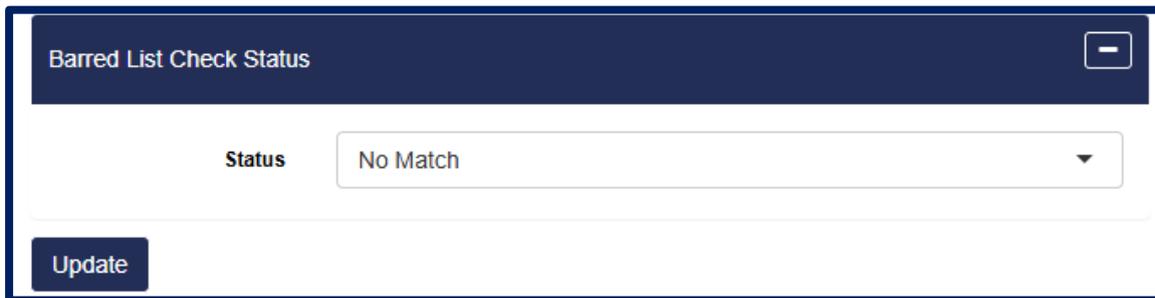
Fig 59. 'Barred List Check Status' field – 'No Match' option.

13) Tracking Disclosure Applications

Disclosure results for applications submitted by E-bulk are typically received within 1-7 days of submission. The process may be lengthened if an applicant has lived in several areas and information is required from multiple police forces.

Whilst applications are in process with the DBS, an integrated tracking tool can be used within the system to follow the progress of the application with the DBS. The tracking tool will show the real-time DBS status, including which stages of the process have been completed.

This can be performed from the either the 'Application Dashboard' page or the 'View Applications' page by clicking on the 'Receipt Received' status icon next to the applicable application.

Fig 60. Application tracking – DBS stages.

You can click the 'Refresh' button on this page to update the tracking information.

The integrated tracking functionality provides the quickest and easiest means of tracking the status of a disclosure application. Alternatively, you view the same information on the DBS website via the links below:

Standard/Enhanced Tracking on DBS Website

DBS Basic Tracking on DBS Website

This service is open to applicants, employers and Registered/Umbrella bodies.

To track an individual application on the DBS website, you will need to provide:

- The applicant's date of birth
- The disclosure application form reference number (also known as the E-Form reference number) – this can be found by searching for the candidate and clicking on the ✉ symbol.

The five stages of the DBS check process are:

i.   Application form received and validated
ii. Police National Computer (PNC) searched
iii. ISA Children, ISA Adults and List99 searched, where applicable
iv. Records held by the Police search
v.   Disclosure Printed

14) Escalating Applications with the DBS

> The following option is available as a free of charge configuration, please contact your representative if you would like this option activated.

This functionality allows admin users to record escalations with the DBS against Standard/Enhanced applications which have been in progress with the DBS for 60 days or more.

The 'Escalated with DBS' radio button field appears against Standard/Enhanced DBS applications in the 'Receipt Received' status.

An admin user can select that the application has been escalated with the DBS, which will be recorded in the application history and will trigger associated email templates, intended to keep managers updated with disclosure progress.

The field can be configured from within the 'Additional Information' section of the 'Edit Application' page:

Fig 61. 'Edit Application' page – 'Escalated wit DBS' field.

15) Disclosure Results

Once disclosure results have been received, a 'Disclosure Number' is issued by the DBS. Disclosures for online applications are received electronically and can be accessed by selecting the 'Result Received' icon from the 'Application Dashboard'.

The EmploymentCheck system has a nightly process which loads in all disclosure results received that day. This process runs around midnight each day and will trigger the automated result emails to managers.

Disclosure certificates are sent to applicants in the post.

15.1   Clear Disclosures

Any clear online disclosure will be denoted with a symbol. A system-generated email is also automatically sent to the nominated manager(s) informing them that the DBS check has been completed for their employee, providing the disclosure number for that check.

On the EmploymentCheck system, disclosure results where there **was no content** on the certificate will be displayed with the wording:

'Certificate contains no information'

Disclosure Type	Enhanced
Disclosure Status	**Certificate contains no information.** *This is a summary of the DBS disclosure, this page is not a certificate issued by the DBS. The certificate is sent to the applicant.*
DBS Application Reference	E0111111111
Disclosure Number	00123456789
Disclosure Issue Date	22-07-2025 00:00:00

Fig 62. Disclosure result view.

It should be noted that the electronic result is not a DBS certificate, and the hard copy certificate should be viewed in all cases prior to the individual commencing their role.

15.2   Disclosures with Content

Any disclosure result returned with content will trigger a 'Notification of Result with Content' email to the nominated manager(s) informing them that they have received a result which will require them see the applicant's certificate.

On the EmploymentCheck system, disclosure results where there **was content** on the certificate will be displayed with the wording:

'Please wait to view applicant certificate'

Any disclosures with content will be flagged with a "**P**" symbol when viewed from the 'View Applications' page.

Fig 63. Disclosure result with content icon.

> It should be noted that the electronic result is not a DBS certificate, and the hard copy certificate should be viewed in all cases prior to the individual commencing their role.

Disclosure Type	Enhanced
Disclosure Status	**Please wait to view applicant certificate.** *This is a summary of the DBS disclosure, this page is not a certificate issued by the DBS. The certificate is sent to the applicant.*
DBS Application Reference	E0111111111
Disclosure Number	00123456789
Disclosure Issue Date	22-07-2025 00:00:00

Fig 64. Disclosure result information.

15.3 Recruitment Decision

The following option is available as a free of charge configuration, please contact your representative if you would like this option activated.

The 'Recruitment Decision' function enables admin users to record the 'Recruitment Decision' taken following receipt of a disclosure result in line with the DBS's guidance on 'Handling of DBS Certificate Information'.

A 'Recruitment Decision' can be entered for checks in either the 'Result Received' or 'Holding' status via a dropdown menu on both the 'Application Dashboard' and 'Edit Application' pages.

Fig 65. 'Application Dashboard' - 'Recruitment Decision' option.

Fig 66. 'Recruitment Decision' field.

When a 'Recruitment Decision' ('Appoint'/ 'Decline') is entered, a pop-up will appear on screen prompting you to enter the name of the individual who took the recruitment decision. By default, this will initially display the 'Manager' for the check and their email address.

Fig 67. 'Recruitment Decision' – 'Recruitment decision taken by' field.

Details of the recruitment decision are also saved in the application history.

16) Certificates of Good Conduct

For applicants whose five-year address history includes a non-UK address, an automated email will be generated upon completion of ID verification to the applicant (copying in the manager) indicating that a Certificate of Good Conduct (CGC) is required.

An admin user can confirm receipt of the CGC via the 'Edit Application' screen. Please note that the disclosure / CGC clearance email will not be sent until both the disclosure and CGC have been received.

If an application is returned and a CGC has not been received, the application will automatically be moved to the 'Holding' status.

Once in the 'Holding' status, if the CGC is logged as received in the 'Edit Application' page, the application will then automatically be moved into the 'Result Received' status and the 'Notification of Result CGC Received' email will be sent to the manager.

| CGC Required | Yes ● | ○ No |
| CGC Received | Yes ○ | ● No |

Fig 68. 'Edit Application' page – CGC options.

Use of the CGC functionality is an organisation decision and is not mandated by the DBS. Result emails will not be triggered until the CGC has been marked as 'received'.

17) Archiving Applications and Data Retention

Personal data is purged in line with DBS and GDPR requirements 24 months after an application is moved to 'Application Archived' status.

The system provides an automated archiving function on two application statuses:

- 'Waiting for Applicant to Fill in Details' status
- 'Result Received' status

The automated archiving timeframe on these two statuses is set by the organisation, if you are unsure what the automated timeframe is, please check with the support team. The automated archiving functionality runs daily to move applications to the 'Application Archived' status after the auto archive timeframe has elapsed.

Customers are responsible for the archiving of all other completed/withdrawn applications as outlined in our SLA. This archiving process can be actioned against applications in bulk from the 'Application Dashboard', the sort filters can be used to order applications based on how long they have remained in a certain status.

An automated nightly process identifies applications which have passed the 24-month retention period and removes personal data saved against the check. A shell record of the application is retained which includes the disclosure Information.
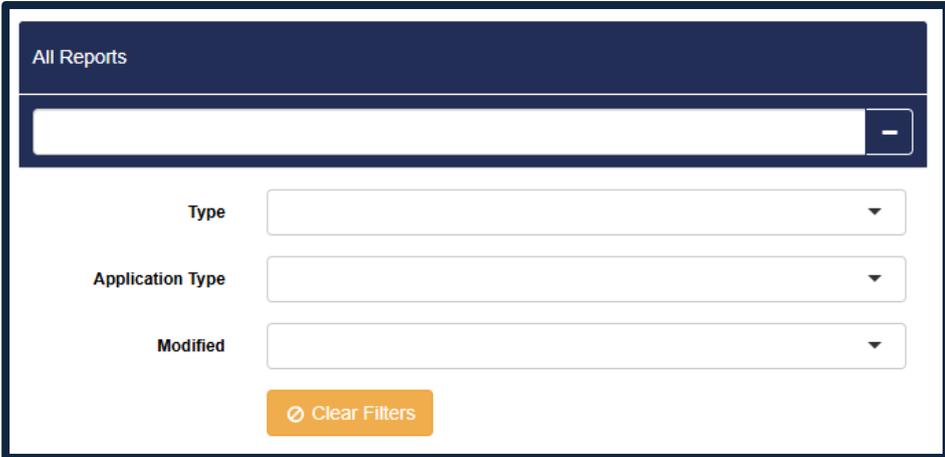
> You can archive records in bulk via the 'All'/'None' checkbox and 'Archive' option on the 'Application Dashboard'. Alternatively checks can be archived individually via the 'Edit Application' page.

18) Reports

To view and run reports on the system click on the 'Reports' option from the navigation panel. This will display the list of reports available.

'BU Admin' users will only see reports allocated to their business unit and the output displayed when the reports are by these users will only relate to their own business unit.

You can search for a specific report by using the search bar at the top, or you can click the expander icon and select criteria from the dropdown filters.

Fig 69. 'Report' page – search field expander.

To run a report, click on the green 'run' icon from the 'Actions' column against the report. This will display a preview of the report on-screen which can be downloaded as a CSV file or PDF.

Report	Type	A	Runs	Min	Max	Avg	Actions
Applicants on Hold with notes	Custom	DBS	2	0.00	0.00	0.00	

First   Previous   1   Next   Last

Fig 70. 'Report' page – run reports.

Some reports require a date range selection, for these options, select the dates to be used for the report run from the calendar options onscreen.

| 1st of Billing Month | DD/MM/YYYY |
| Last Day of Billing Month | DD/MM/YYYY |

Fig 71. 'Report' page – set report parameters.

To export the data to a CSV format, click on 'Download results as CSV' or the 'View result as PDF' buttons.

Export results as CSV   View result as PDF

Fig 72. 'Report' page – export as CSF and view result as PDF options.