



CITB ONLINE PORTAL USER GUIDE

Request access to your employer

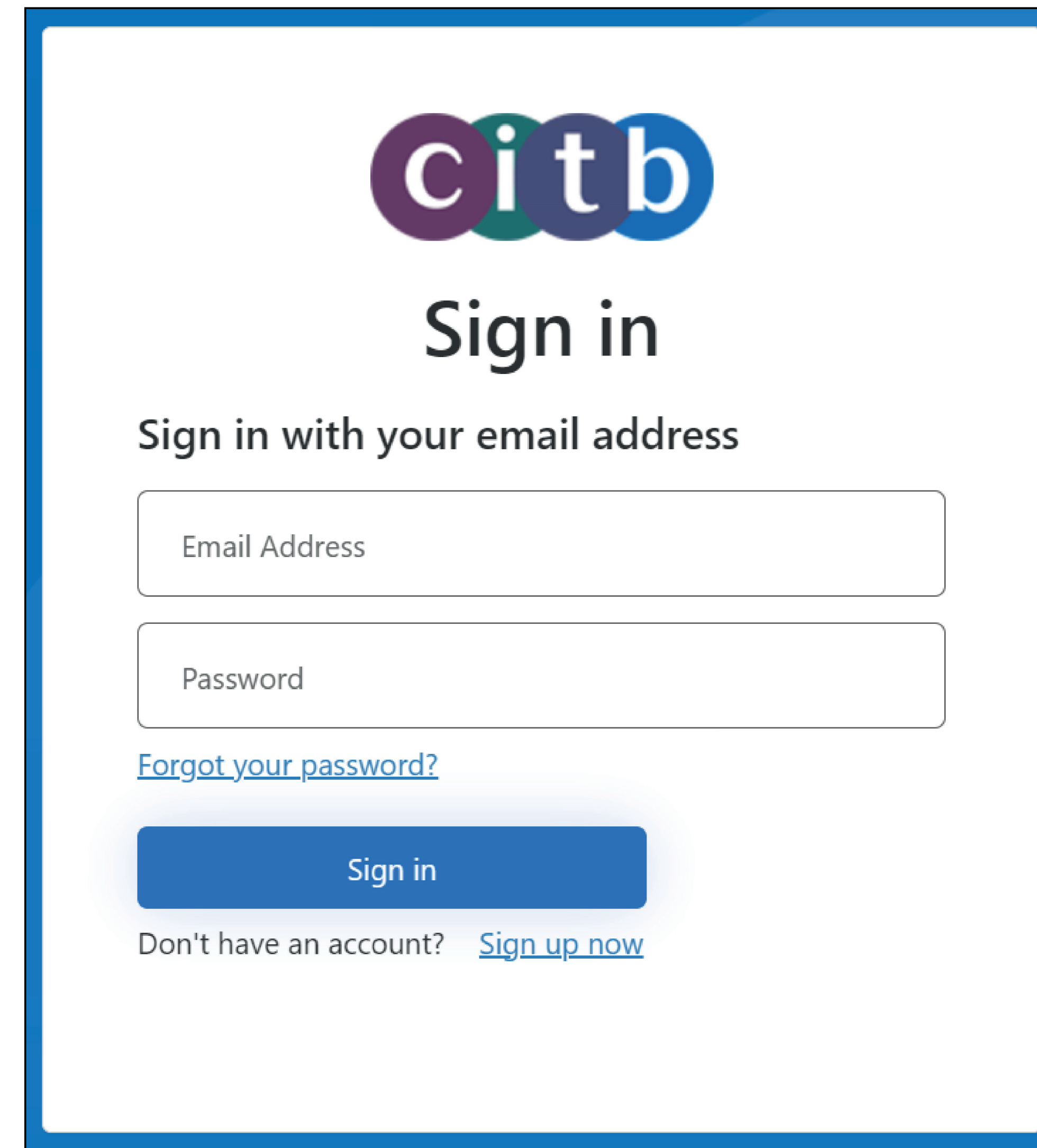


Section 1. Signing in

- 1 Click on the '**Sign in**' button at the top right corner of the portal.
- 2 You will now be directed to the Sign in page.

The screenshot shows the CITB Online Services portal. At the top left is the CITB logo. At the top right are links for 'Home', 'English', and a 'Sign in' button. The main heading is 'Welcome to CITB Online Services'. Below this is a paragraph: 'This online portal allows you to submit & view grant applications, access grant reports, and authorise automated grants. We are working on adding more services to this site over time. While under development, some links below may redirect you to the existing online portal, and you may be asked to log in again.' There are two main sections: 'Grant applications' and 'Other grant services'. Under 'Grant applications', there are two links: 'Apply for a grant' (with description: 'Apply for grants online for apprenticeships, qualifications, or short courses.') and 'My grant applications' (with description: 'View your saved or submitted online grant applications.'). Under 'Other grant services', there is a note: 'These links may redirect you to our legacy portal in a new tab or window.' followed by four links: 'Authorise automated grants' (description: 'Authorise an attendance grant payment, or tell us about a change to entitlement.'), 'Grant report request' (description: 'Request grant reports and access passwords for encrypted reports.'), 'Grant statement' (description: 'View the total value of grants paid for the current and previous year.'), and 'Short course grants' (description: 'View and apply for short course grants.').

- 3 Enter your email address and password.
- 4 Click on '**Sign in**' to access the portal.



The screenshot shows the Citb Sign in page. At the top is the Citb logo. Below it is the heading "Sign in" and the instruction "Sign in with your email address". There are two input fields: "Email Address" and "Password". Below the "Password" field is a link for "Forgot your password?". At the bottom is a blue "Sign in" button and a link for "Don't have an account? Sign up now".

Section 2. Request access to your employer portal

1 If you're not connected to an employer yet, you'll see the 'Request access to an employer' screen.

2 Complete the compulsory (*) fields.

3 Click on 'Submit' to send your request.

Request access to an employer

Complete the form below to request access to a CITB registered employer. If access is granted, this will enable you to act on behalf of the employer within the online portal. You can request the specific level of access you require.

If the employer already has at least one user with administrative access, your request will be sent to them for their approval in their online account.

If the employer does not have any online users, your request will be sent to our Customer Operations team for approval.

Submitted Requests (past 3 months) Search:

| Employer registration number | Employer name | Access | Role | Status reason | Created on date |
|------------------------------|---------------|--------|------|---------------|-----------------|
| No submitted requests found. | | | | | |

Showing 0 to 0 of 0 entries

Employer Registration Number *
The 7-digit registration number of the employer. This can be found on letters and other correspondence from CITB.

Employer Name *
The name of the CITB registered employer.

Access *
The access you are requesting. You can only select one access-type on this form. If you need multiple accesses, complete this form again.

Employer Registration Number *
The 7-digit registration number of the employer. This can be found on letters and other correspondence from CITB.

Valid employer registration number

Employer Name *
The name of the CITB registered employer.

Access *
The access you are requesting. You can only select one access-type on this form. If you need multiple accesses, complete this form again.

Role
The role you need to perform for the employer. Users can perform all non-admin activities, including submitting and viewing grant applications where the Access is Grant. Admins can add additional users, remove users, and respond to Grant access requests from others—on top of also being able to perform all User activities.

Primary grant user
If you would like to request to be the primary grant user against the employer, select the option below.

The primary grant user is emailed encrypted grant reports, and emailed notifications when grants are awaiting authorisation.

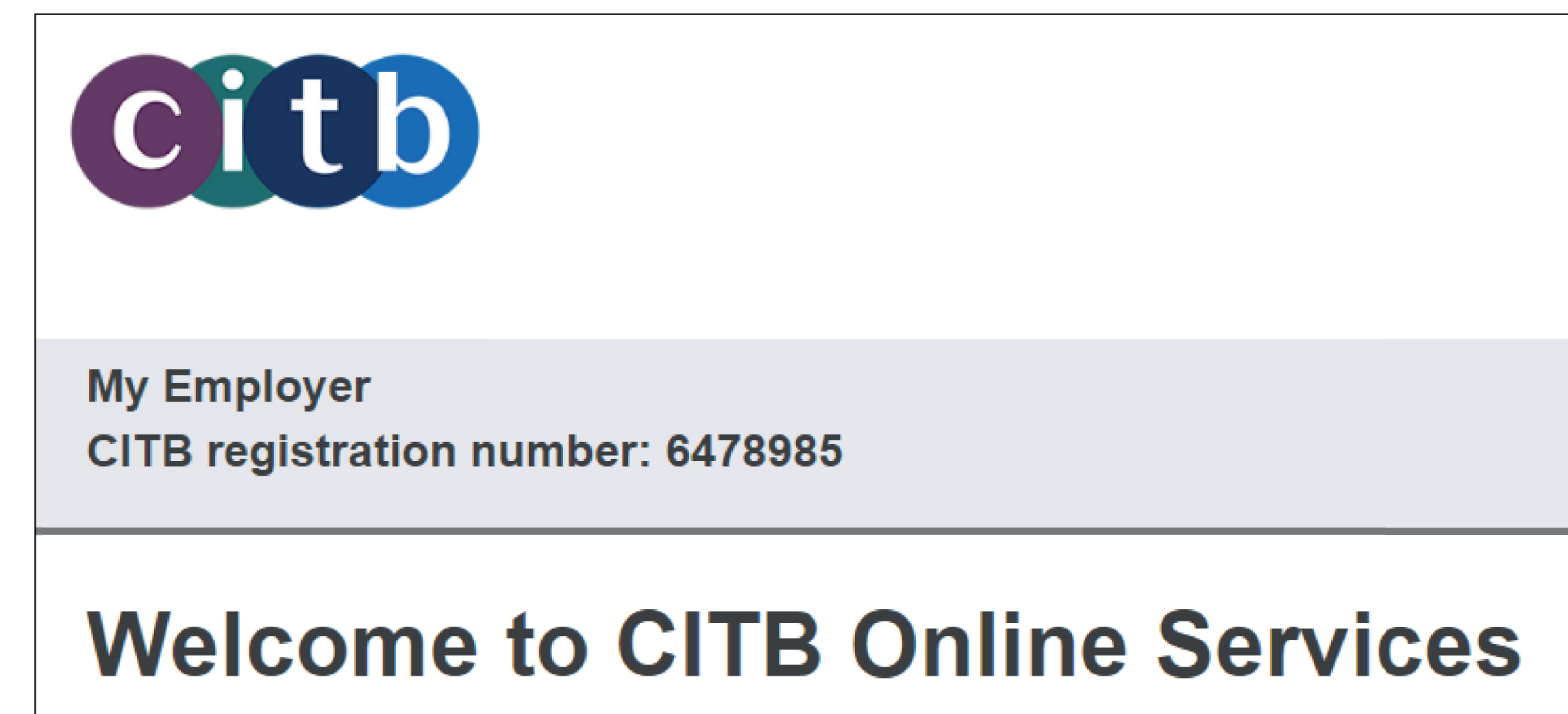
Other grant users are **not** restricted from any grant-related activity in the employer account. This status purely determines the receipt of the above-mentioned emails.

There can only be one primary grant user for an employer. If you are the first grant user against the employer, you are given this status by default. Please note we are undergoing upgrades to our systems which will remove the need for this status.

4 If you have requested grant access, and your employer has a grant admin user, the request will go to the admin user to approve or reject it.

If your employer does not have a grant admin user, or you have requested Levy access, your request will go to the CITB Customer Operations team for approval.

5 Once your access request is approved, the next time you log in you'll land on the home screen. The employer's details will appear in the top left corner of the header area.



Section 3. Switch employers once logged in (if connected to more than one employer)

If you are connected to more than one employer, you can switch which one you are logged in against at any time. Ensure you are logged in against the employer for whom you are applying for a grant, or completing other portal activity, before doing anything.

- 1 In the header, you'll find the employer name and registration number.
- 2 Click on the '**Select another employer**' link.



- 3 The '**Employer selection**' page will appear.
- 4 Choose a different employer from the list.
- 5 Click the '**Select Employer**' button.

Select the employer to log in against

On this page, you can select which employer you are logged in against.

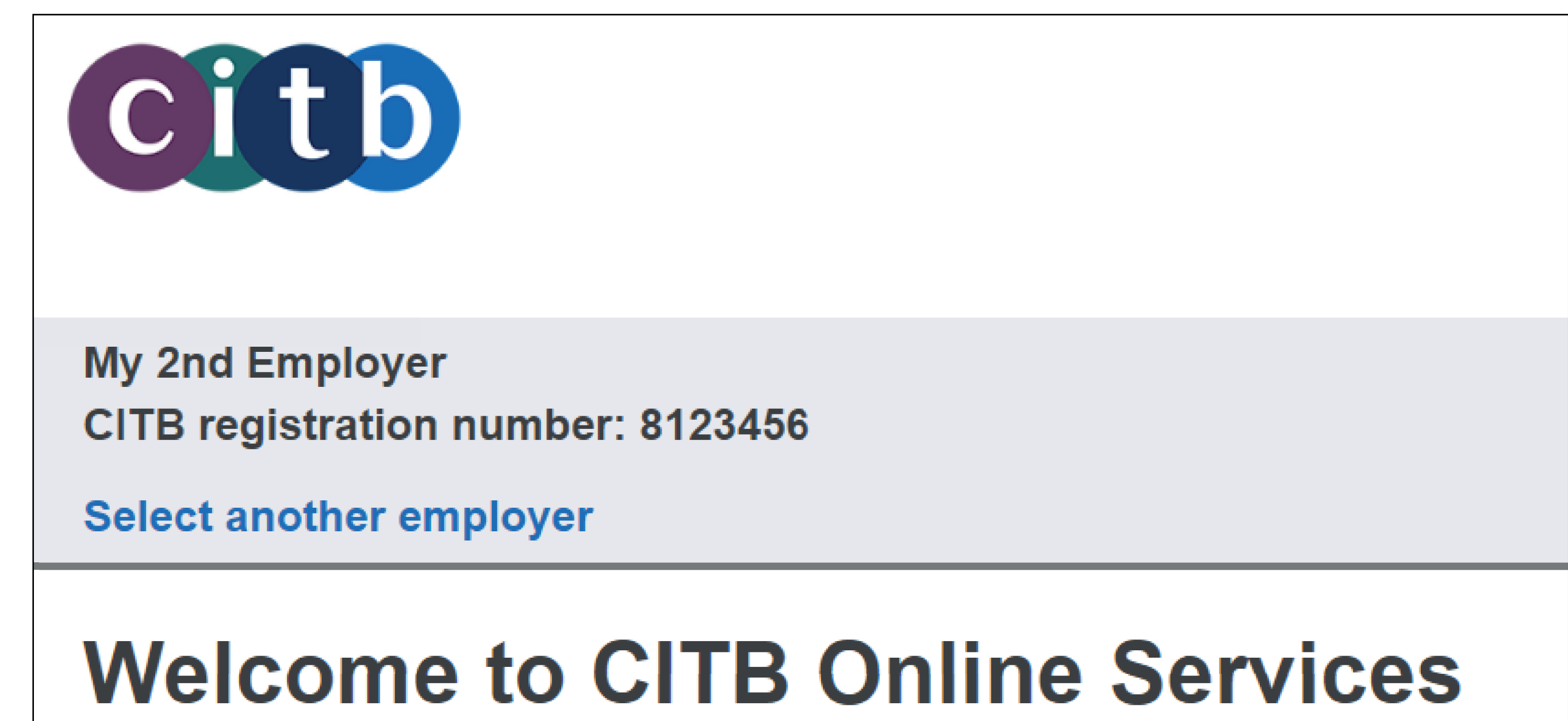
Select an employer

| | |
|---------------------------|---|
| 6478985 - My Employer | ▼ |
| 6478985 - My Employer | |
| 8123456 - My 2nd Employer | |
| 8123801 - My 3rd Employer | |

[Select Employer](#)

You can also [request access to another employer](#).

- 6 Now you'll see the details for the newly selected employer in the header.



citb

My 2nd Employer
CITB registration number: 8123456

[Select another employer](#)

Welcome to CITB Online Services