

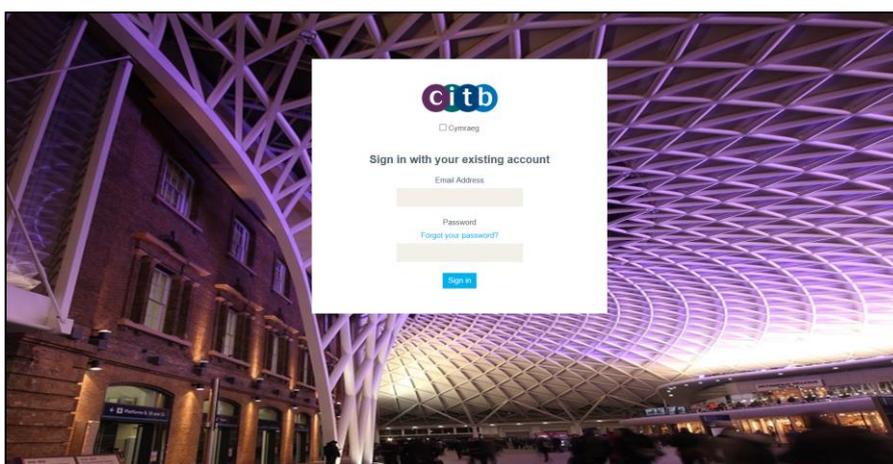
CITB Online – Grant Top Tips

CITB Grant Online will improve the speed at which Grant payments are received. As a CITB Grant Online user, you will be able to:

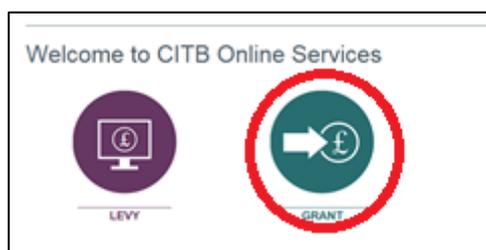
- Authorise Grant Claims quickly and easily
- Request Grant Reports in order to reconcile your payments
- View Grant Statements to see how much Grant has been paid or is Awaiting Payment.
- Manage multiple Grant accounts online
- Enable access to multiple users

1. Go to my.citb.co.uk using your internet browser, and sign in using the details supplied in the email you received upon registering. If you have not yet registered please go to:

<https://www.citb.co.uk/levy/sign-up-to-citb-online/>



2. Click on “Grant” to Authorise Grant Claims, Request Grant Reports, and view Grant Statement



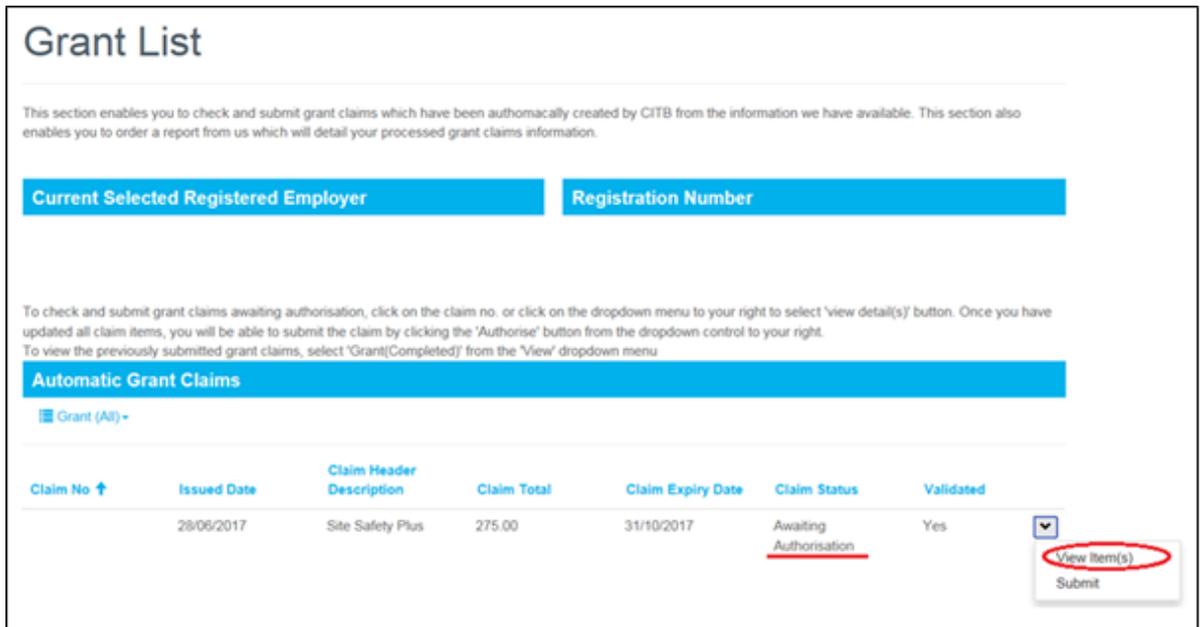
3. You will now be able to specify the Grant Online service you wish to use...

Authorise Automated Grant Claims

1. To authorise automated Grant Claims, select “Authorise Automated Claim”



2. Choose the grant claims which are awaiting authorisation, and select “View Items”



The screenshot shows a web interface titled "Grant List". Below the title, there is a paragraph of text: "This section enables you to check and submit grant claims which have been automatically created by CITB from the information we have available. This section also enables you to order a report from us which will detail your processed grant claims information." There are two blue buttons: "Current Selected Registered Employer" and "Registration Number". Below this, there is another paragraph: "To check and submit grant claims awaiting authorisation, click on the claim no. or click on the dropdown menu to your right to select 'view detail(s)' button. Once you have updated all claim items, you will be able to submit the claim by clicking the 'Authorise' button from the dropdown control to your right. To view the previously submitted grant claims, select 'Grant[Completed]' from the 'View' dropdown menu." There is a blue button labeled "Automatic Grant Claims". Below that, there is a dropdown menu showing "Grant (All)". Below the dropdown menu, there is a table with the following columns: "Claim No ↑", "Issued Date", "Claim Header Description", "Claim Total", "Claim Expiry Date", "Claim Status", and "Validated". The table has one row with the following data: "28/06/2017", "Site Safety Plus", "275.00", "31/10/2017", "Awaiting Authorisation", and "Yes". To the right of the table, there is a dropdown menu with a "View Item(s)" button (circled in red) and a "Submit" button.

Claim No ↑	Issued Date	Claim Header Description	Claim Total	Claim Expiry Date	Claim Status	Validated
	28/06/2017	Site Safety Plus	275.00	31/10/2017	Awaiting Authorisation	Yes

Continued...

3. Check the details of the claim are correct

Grant Item Main

Grant Code	Course Title
A29	SITE MANAGEMENT SAFETY SCHEME
Candidate Name	Achievement/Entitlement Due Date
Test Candidate	
Candidate ID	Confirmation Status
T38242XX	<input type="text"/>
Occupation	Employee Status
SITE MANAGER	<input type="text"/>
Claim Value *	
275.00	

4. Set the “Confirmation Status”, then set the “Employee Status” and other fields if required, then select “Submit”

Grant Item Main

Grant Code	Course Title
A29	SITE MANAGEMENT SAFETY SCHEME
Candidate Name	Achievement/Entitlement Due Date
Candidate ID	Confirmation Status
	<input type="text" value="Claim Authorised"/>
Occupation	Employee Status
SITE MANAGER	<input type="text" value="PAYE"/>
Claim Value *	
275.00	

- The Claim will now show as Awaiting Authorisation, you will need to select “Authorise Grant Claims” to Submit your claim to CITB

Home > Grant > **Authorise Grant Claims** > Grant Items

Grant Items

Claim No

Employer Reg Employer

Automated Grant Claim Items

Claim Item No	Grant Code	Candidate Name	Candidate ID	Course Title	Claim Value	Employee Status	Confirmation Status	Candidate Leave Date	Achievement/Entitlement Due Date	Claim Status
	A29			SITE MANAGEMENT SAFETY SCHEME	275.00	PAYE	Claim Authorised		19/05/2017	Awaiting Authorisation 

- On the Grant List screen, select the small arrow, and then select “Submit” to finish the process.

Grant List

This section enables you to check and submit grant claims which have been automatically created by CITB from the information we have available. This section also enables you to order a report from us which will detail your processed grant claims information.

Current Selected Registered Employer Registration Number

To check and submit grant claims awaiting authorisation, click on the claim no. or click on the dropdown menu to your right to select 'view detail(s)' button. Once you have updated all claim items, you will be able to submit the claim by clicking the 'Authorise' button from the dropdown control to your right. To view the previously submitted grant claims, select 'Grant(Completed)' from the 'View' dropdown menu

Automatic Grant Claims

☰ Grant (All) ▾

Claim No ↑	Issued Date	Claim Header Description	Claim Total	Claim Expiry Date	Claim Status	Validated
	02/11/2017	Site Safety Plus	300.00	30/06/2018	Completed	Yes 
	28/06/2017	Site Safety Plus	275.00	31/10/2017	Awaiting Authorisation	Yes 

View Item(s)

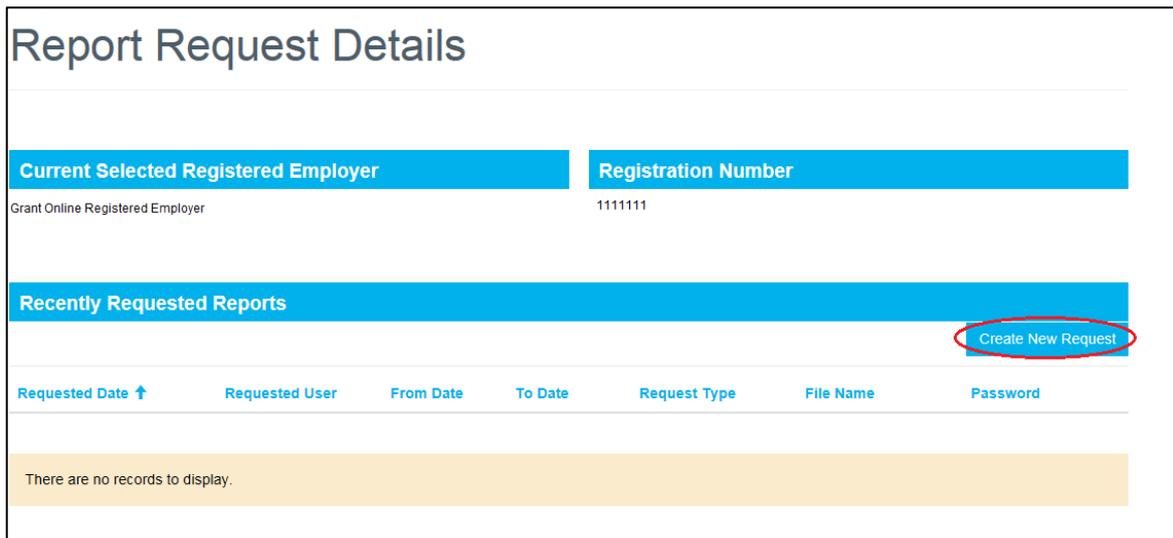
Submit

Request Grant Report

1. To request a Grant Report, click on “Grant Report Request”



2. To create a new request, select “Create New Request”



Continued...

3. Specify the date range for which you wish the report to run, and select the "Request Type" from the drop down list

4.

Create

Select Report Dates

From Date * 29/10/2017 To Date * 21/11/2017

Request Type *

- By Payment Date
- By Transaction Date

Submit

4. The requested report will be sent via email within one working day. It will contain a password protected ".zip" file; the password for this is displayed in the Recently Requested Reports grid

Recently Requested Reports							Create New Request
Requested Date ↑	Requested User	From Date	To Date	Request Type	File Name	Password	
21/11/2017 8:11 AM	Sam Adkin	29/10/2017	21/11/2017	By Payment Date	GrantReport20171121081114.imp	% 1R@5DX@+g1@5@% -Kj+	

Grant Statement

1. To view a Grant Statement, select “Grant Statement”



2. The Grant Statement will be displayed, to view more detail for any line, select the small arrow. To view different pages of information use the navigation arrows at the bottom of the page.

Grant Statement Details

This service enables you to view the total value of grants paid for the current and the previous Grants Scheme year, and the total value of any outstanding grant payments. Your most recent grant postings are listed and you can view the information based on a specific date range or grants scheme year by selecting the relevant filter option. You are able to view detailed information relating to a grant payment or a grant claim which is listed by selecting the arrow at the end of the row you wish to view.

21-NOV-2017 BALANCE

Total value of Grants paid	2017/18	£ 9,680.00 ▶
Total value of Grants paid	2016/17	£ 753,489.42 ▶
Outstanding Grant Balance		£ 0.00 ▶

FILTER BY

Please choose ▼

MOST RECENT POSTINGS

Processed Date	Description	Credit £	Debit £	
16-Nov-17	Grant Claim	0.00	309.38	▶
16-Nov-17	Grant Payment	346,335.10	0.00	▶
16-Nov-17	Grant Claim	0.00	440.00	▶
16-Nov-17	Grant Claim	0.00	309.38	▶
16-Nov-17	Grant Claim	0.00	309.38	▶
16-Nov-17	Grant Claim	0.00	1,237.52	▶
16-Nov-17	Grant Claim	0.00	337,535.00	▶
16-Nov-17	Grant Claim	0.00	309.38	▶
16-Nov-17	Grant Claim	0.00	309.38	▶
16-Nov-17	Grant Claim	0.00	2,172.50	▶

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Summary ▶