



CITB ONLINE PORTAL USER GUIDE

Being an admin user

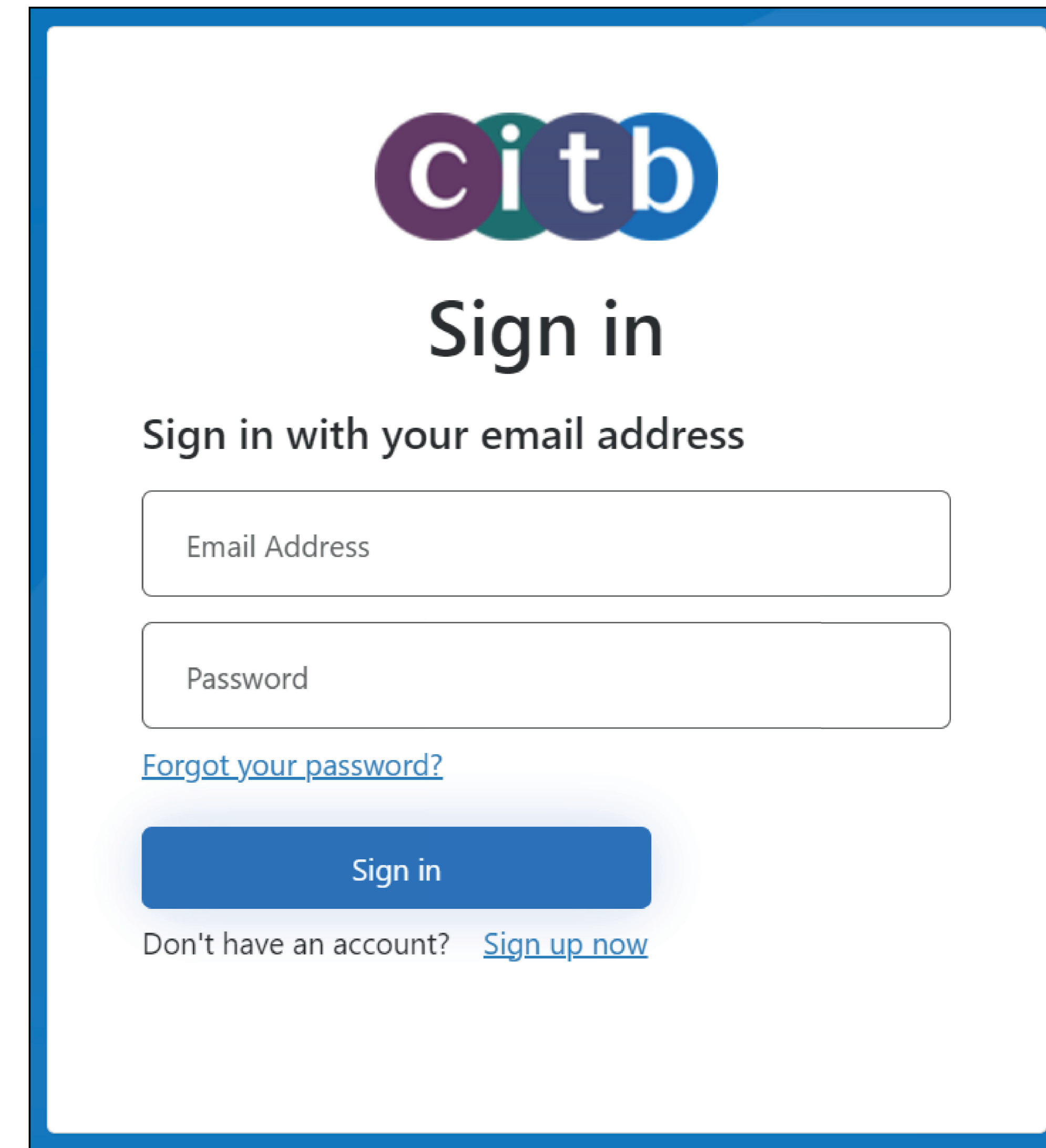


Section 1. Signing in

- 1 Click on the '**Sign in**' button at the top right corner of the portal.
- 2 You will 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 highlighted with a red box. The main content area has a heading 'Welcome to CITB Online Services' followed by 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.' Below this is a section titled 'Grant applications' with two columns: 'Apply for a grant' (Apply for grants online for apprenticeships, qualifications, or short courses.) and 'My grant applications' (View your saved or submitted online grant applications.). A horizontal line separates this from the 'Other grant services' section, which includes a note: 'These links may redirect you to our legacy portal in a new tab or window.' Below this are four columns: 'Authorise automated grants' (Authorise an attendance grant payment, or tell us about a change to entitlement.), 'Grant report request' (Request grant reports and access passwords for encrypted reports.), 'Grant statement' (View the total value of grants paid for the current and previous year.), and 'Short course grants' (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".

▶ **Being an admin user**

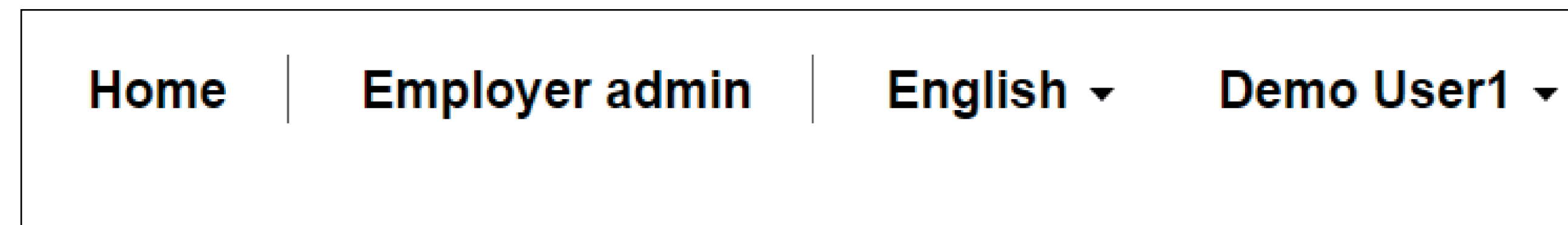
This guide will take you through how to manage grant portal access and activity on behalf of or as an employer.

Admin users can:

- Approve or reject a user's grant access request to the employer portal
- Modify which grant roles users are granted for portal activity
- Add, change, or remove user's grant access from the employer portal account
- Set or update the main grant contact who receives grant reports and authorisation emails.

Section 2. Access the employer admin area

1 Click on the '**Employer admin**' button in the header area.



2 You will be directed to the '**Manage access to this employer**' page.

Manage access to this employer

This page allows you to see who else has access to this employer in the online portal.

You can add or remove access from here or modify user roles. This includes giving other users administrative permission so they can also access this page.

In addition, you can see and respond to requests from other users to be linked to your employer. If you do not recognise an individual requesting access, make sure you reject the request.

[Log in audit trail](#)

[Add user against employer](#)

[User access request management](#)

Users with access to this employer

10 entries per page

Search:

Full name	Email address	Contact status	Date added	Access	Role	Primary grant user	Manage
Demo User1	onlineservices+user1@citb.co.uk	Active	22/11/2024	Grant	Admin	✓	Manage
Demo User2	onlineservices+user2@citb.co.uk	Active	22/11/2024	Grant	User		Manage

Showing 1 to 2 of 2 entries

« < 1 > »

Section 3. Add users and give access to the employer's grant portal

3 On the '**Manage access to this employer**' page, click the '**Add user against employer**' link.

4 Fill out the required information for the new user in the provided form.

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This page allows you to see who else has access to this employer in the online portal.

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Showing 1 to 2 of 2 entries « ‹ 1 › »

▶ Role overview

Individuals with the Grant User role can:

- Submit new grant applications on behalf of the employer
- View draft application forms saved to the employer, including those saved by others with access to the employer account, and either delete, modify, or submit the draft forms
- View previous application forms submitted to this employer account, including those by other users. Full details of the forms, including personal data, can be viewed.

▶ Role overview

In addition to also being able to complete the previous activities, people with the Grant Admin role can:

- View other users who have Grant access to the employer account through this portal
- Manage the access of other users, including removing them or changing their role to Grant User or Grant Admin
- Add new users as either Grant Admins or Grant Users to access the employer account
- Respond by approving or rejecting access requests sent from other portal users
- View the history of logins to the employer account from anyone with access.

▶ Role overview

Only grant access to people you know and trust.

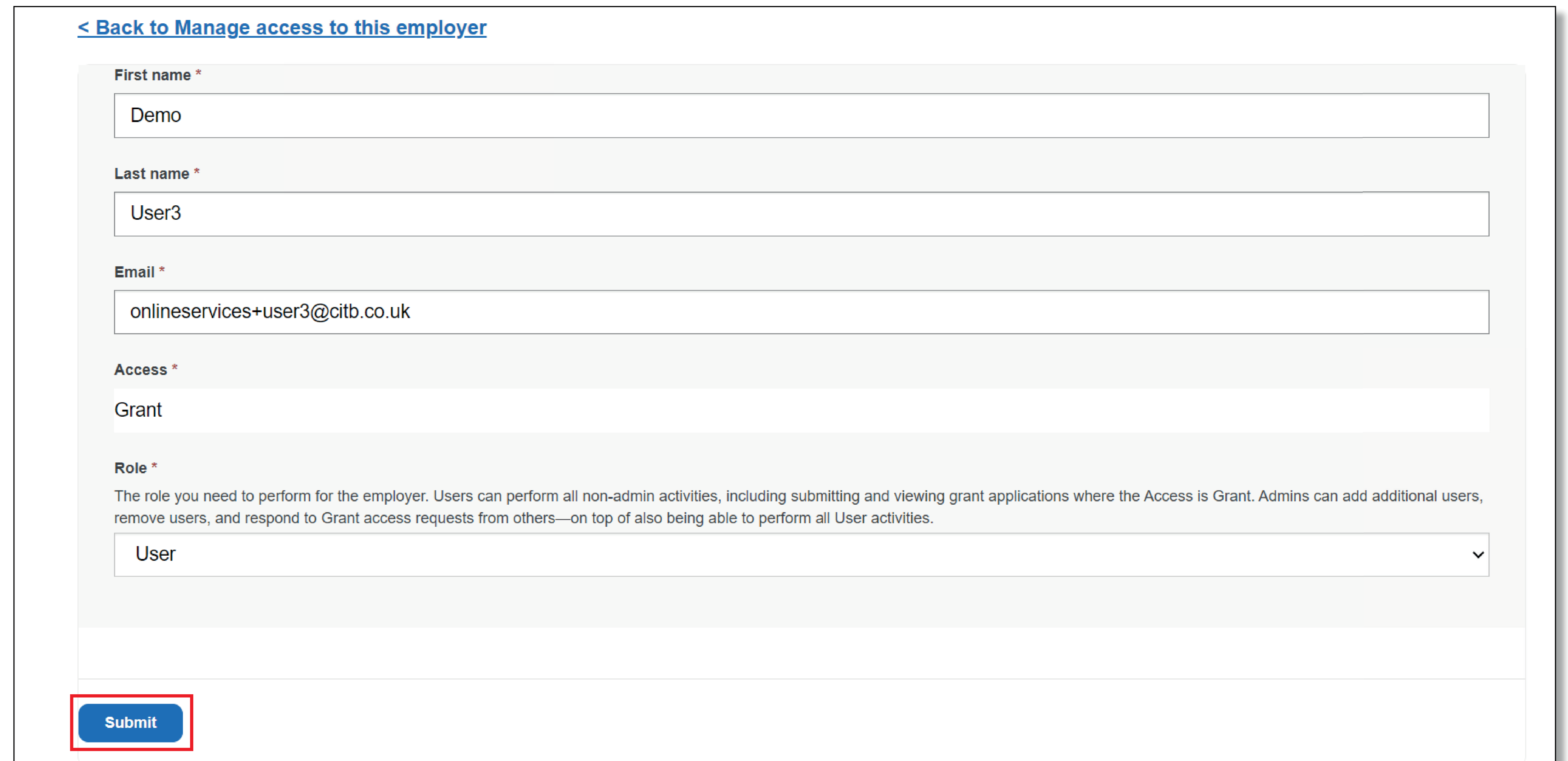
Make sure anyone you give access to only views or processes personal data in the employer account if they're legally authorised to do so.

If the person already has an online account with us, they will be given permission immediately to access your employer on the portal, and they will see it when they next log in.

If the person does not have an online account with us, we will send them an invitation to set up their account.

5

Once completed, click the **'Submit'** button.



< [Back to Manage access to this employer](#)

First name *
Demo

Last name *
User3

Email *
onlineservices+user3@citb.co.uk

Access *
Grant

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.
User

Submit

Section 4. Modifying roles and access of existing users

The following section sets out how you can manage the access and role of existing users with grant access to your employer.

- 1 On the '**Manage access to this employer**' page select a user from the list shown and click '**Manage**' in the last column to open the '**Update user role**' page.

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Log in audit trail

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Users with access to this employer

entries per page

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Showing 1 to 2 of 2 entries

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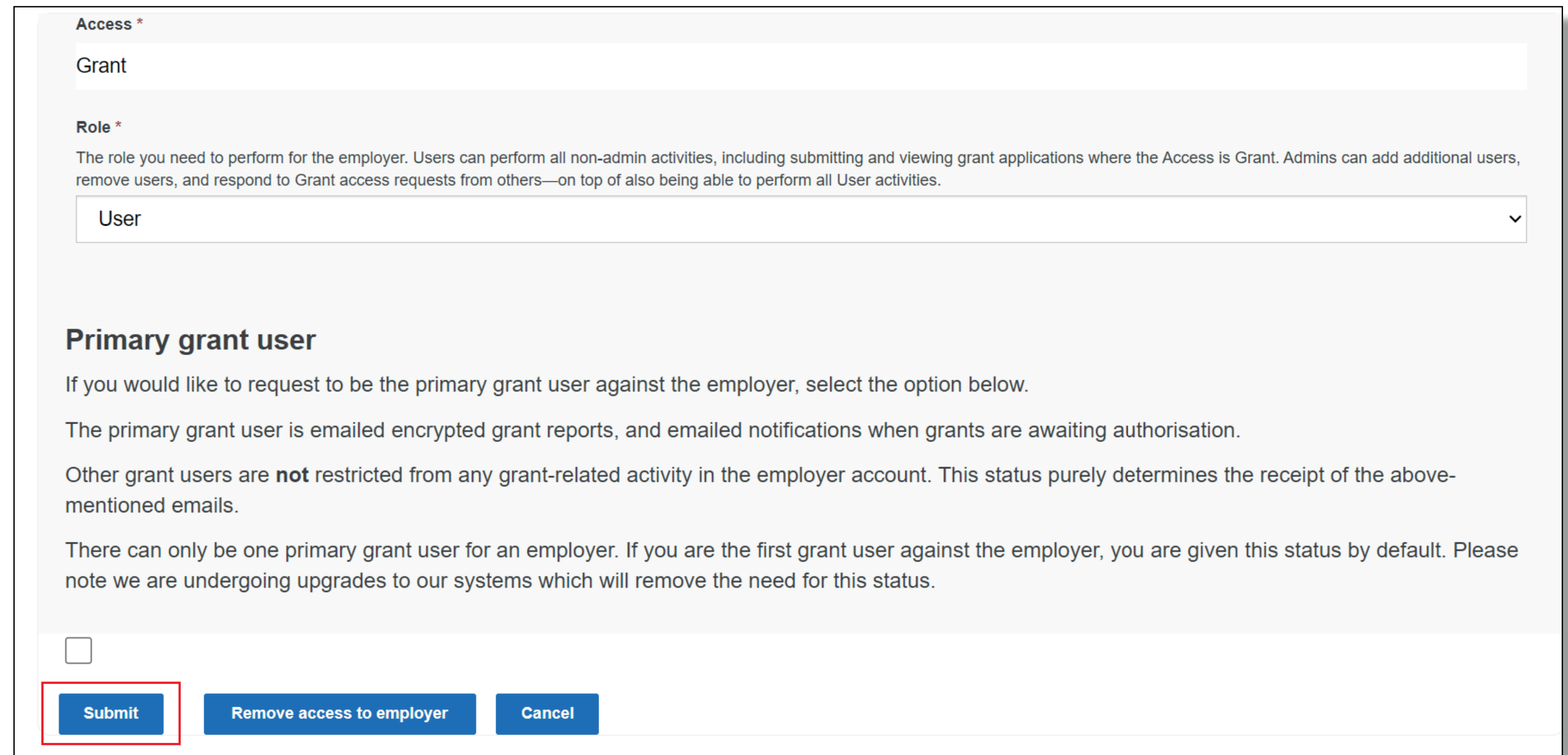
2

On this page, you can:

- Remove or add the status of Primary grant user
- Remove the user's grant access to the employer portal
- Change the role from user or admin, or vice versa.

3

When you have made the required amends, click '**Submit**'.



Access *

Grant

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.

User

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.

Submit **Remove access to employer** **Cancel**

▶ Section 5. Confirm a user's request to access your employer

Users can request access to the employer. As an admin user, you can approve or reject grant access requests in portal.

1 There are three ways you, as an Employer Admin, will be aware of access requests requiring your attention:

- On the portal login
- In the Employer admin section within the portal
- Via an email notification.

2

You can check for pending access requests on the **'Manage access to this employer'** page by clicking **'User access request management'**.

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[Add user against employer](#)

[User access request management](#)

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- 3 You will now be presented with a table showing a list of requests which you can approve or reject.

Pending requests

10 entries per page Search:

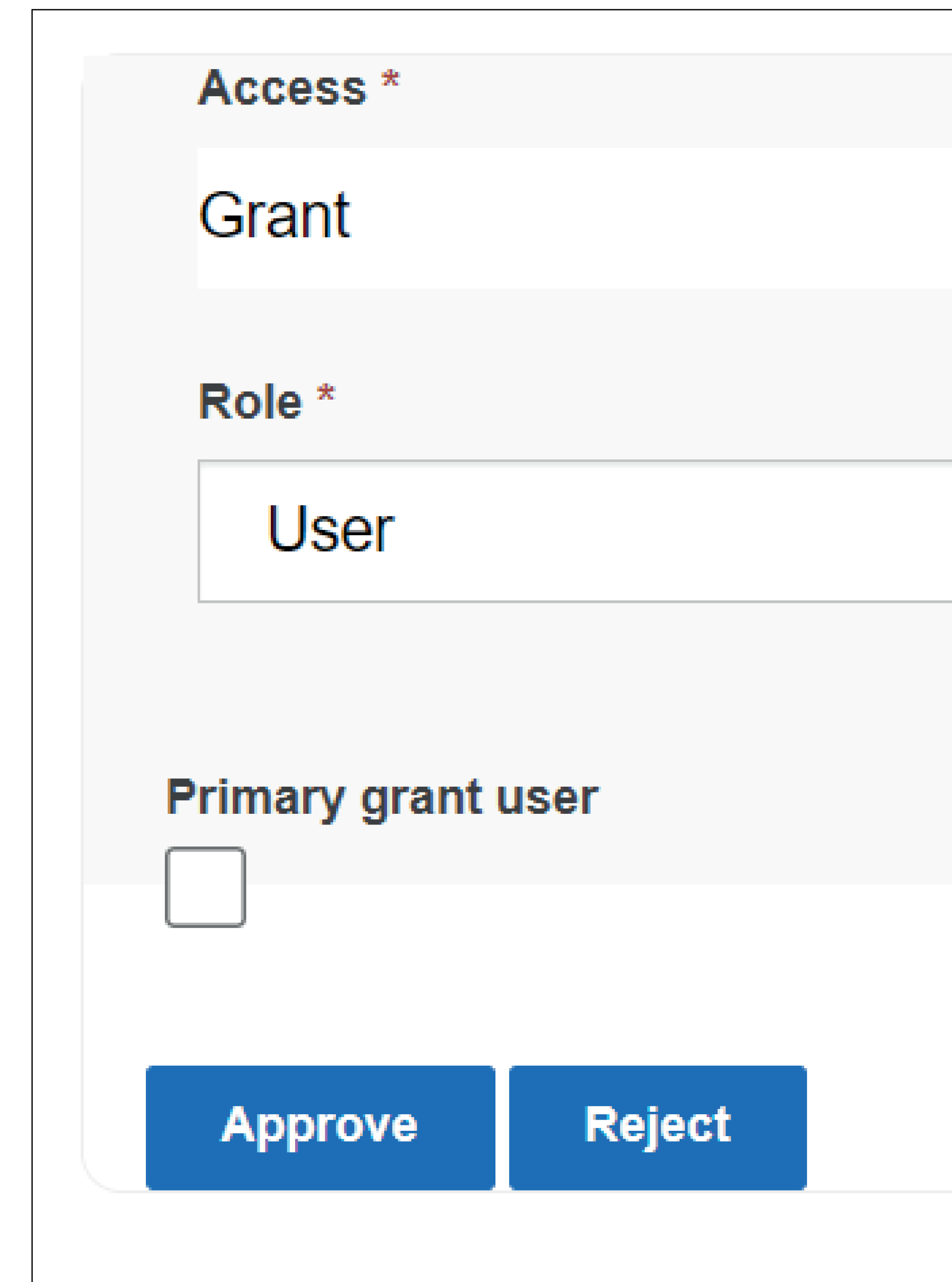
Date added	Full name	Email address	Access	Role	Approve/Reject
22/11/2024	Demo User3	onlineservices+user3@citb.co.uk	Grant	User	Approve/Reject

Showing 1 to 1 of 1 entry « ‹ 1 › »

- 4 Click on the '**Approve/Reject**' link adjacent to one of the requests.

5 If you recognise the person and want them to have Grant access, click the **'Approve'** button to give this person access to the employer portal.

If you do not recognise the person requesting access to the employer portal click on the **'Reject'** button.



The screenshot shows a form with the following fields and buttons:

- Access ***: A dropdown menu with "Grant" selected.
- Role ***: A dropdown menu with "User" selected.
- Primary grant user**: A checkbox that is currently unchecked.
- Approve**: A blue button.
- Reject**: A blue button.

Section 6. Log ins audit

1 To view an audit of users logging in against this employer, head to the **'Employer admin'** area and click on the **'Log in audit trail'** tile.

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