

electrotechnical certification scheme

EMPLOYER Portal

User Guide

ecscard.org.uk



EMPLOYER PORTAL

User Guide

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The Electrotechnical JIB Setting employment standards

Administered in England, Wales and Northern Ireland by the Joint Industry Board for the Electrotechnical Industry



Administered in Scotland by the Scottish Joint Industry Board for the Electrical Contracting Industry



INTRODUCTION

The ECS Employer Portal has been designed to support companies in the management of their employees' ECS card applications and assessments.

Via the portal you can:

- Make and track card applications.
- Create and manage online ECS card purchases and invoices.
- Monitor card applications on hold.
- View all current employees who hold ECS cards, along with their expiry date and card numbers.

This guide explains how to use the portal to add employees, make card applications and purchases, and set up ECS Assessments. It also outlines how you can set access permissions for others in your organisation.

1. HOW TO

1.1 How to Login to the Employer Portal

To start using your Employer Portal, you will need to sign in to your account by entering your login details & completing verification as below.

	me
Sign in to the ECS website	
Please enter your email address and pass	word to login.
jenainene@yahoo.com	
	۲
WA160	
Enter the characters you see	A
Enter the characters you see	Sign in
Enter the characters you see	Sign in Forgotten password

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

From here you can access all the features on the portal and begin setting up your employees.

Employer Portal	Norbit Sherman 😤 🗮 🎼 🖒 💄 🖥 🎭 🗮 -	볼 Employees -	The Applications +	चि Orders -	Contracts -	ECS Assessments	⁰ 6 Administration +	🖬 Ind Isfo Service 🗸			
ECS Check Company 2 L	td (£2,272.00) / IΞAll Offices - / 🗄 2 offices -					6				G	Get Help
ECS Check Company 2 L	td										* X
Company Name Head Office 👻	ECS Check Company 2 ECS Check Company 2	2 Ltd 2 Head Office					JIB Number Hubble Road, Chelt	tenham, Gloucestershire, GL51 0	H0078820 EX		
All Offices - 2 Offices (£2,272.00)										× 23
Cards Expiring / Expir	red within 3 months					~ H	Application:	s On Hold			× 23
Applications In Progr	ESS not yet dispatched					× 30		s Awaiting Purchase			* 20
Ξ Recent Purchases (last	60 days)									ORDERS REQUIRING ATTENTION	* H



1.2 How to Add Employees

To add an employee, start by clicking the **Employees** tab on the blue toolbar, then select the 'Add New Employee' option from the drop-down menu as shown below.

😫 Employees 🗸	Î A
S With Cards Expirin	ig Soon
😫 Current Employee	es
L+ Add new employe	e

Next,

Fill in the following details:

2. Date of birth

along with either:

- Last name
- ECS Card number
- Health & Safety
 Assessment number

dd/mm/yyyy 🗎
H & S Assessment Number

Click the **QLOOKUP** button to check if the employee record already exists.

If a record is found, this person can be added to your employees list by clicking **Confirm & Continue**. If they are not found fill in the details highlighted below before clicking **Confirm & Continue**.

Title	First Name	Last Name	
Mr	× ~] [Siyach	
NI Number		Date of Birth	Gender
TJ61208A		04/04/2002	₿ M ~
	I Norbit Sherman hereby confirm that the operative shown at	ove started work with	
	ECS Check Company 2 Head Office		× ~
	on the		
	12/03/2024		8
	and that we have the right to view and modify their details.		
		onfirm & Continue	

Once all these steps have been completed the employee will now be successfully added to your employer portal.



1.3 How to Apply for an Employee ECS Card

To make a card application, start by selecting all the employees you wish to apply for and click **START APPLICATIONS** as shown below.

	e	START APPLICATIONS FOR	3 EMPLOYEES	🗍 LEA	VE 3 EMPLOYEES			
		Employee Nam † 🔻	Apps In Progr	ess 🔻	Card No./s	Ţ	H&S status	Ŧ
		T	T	•	T		T	
	~	Fisher, Albert					None	
		Jones, Jeff					None	
1	~	Mac, Daniel					None	

Next select the Card Type you wish to apply for, then click on Create New Application Now.

Choose App	olication Typ	es			
Employee Name 1	NI Number †1	Has 11	Photo 1	Card Type 1	₽ 11
Jones, Jeff	AA654321D			Non-JIB Registered Apprentice - Initial	•
Mac, Daniel	AE564321A			Craft or Related Disciplines - Initial	
Fisher, Albert	SS0123458		05/03/2025	Managerial - Initial 🗸	
					X Cancel

Step 1 - Applicant Details

In the applicant details section add the Business **Phone Number** and **Business Email** address, at the bottom of the screen. You will also need to add a photo for each employee at this stage. To do this click the blue arrow, as shown below, then select the image you wish to upload from your device. Please click the link below for guidance on accepted photos. The photo uploaded will be verified through **Experian**, **Identity Verification** and users will get an email to complete verification after the application has been paid for.

https://ecsprodstorkentico.blob.core.windows.net/ecs-public-media/jib.ecs.portals.web/media/root/downloads/ documents/ecs-photo-guidance.pdf

A	Please make sure that the contact details are correct. This is the	Please make sure that the contact details are correct. This is the address that the card issued from this application will be sent to. Note: Key personal details (Name, DOB, and NI number) are not editable.							
	Title First Name Mr Jaff	Last Name Jones							
26,09/2023 1	NI Number AA000000E	Date of Birth 22(01/2023							
Business Phone (direct dial)		Business Email (direct email) (infigenation							



Step 2: Qualifications, Documents & Occupational Choices Section

In this section, you will need to select the **Occupation & Grade** the applicant is applying for and upload any relevant qualifications or supporting documents to back up the application. Applicants must also meet the **Health**, **Safety & Environmental Awareness Assessment (HS&E)** requirement by either holding a valid **HS&E** assessment or providing a recognised exemption. If the applicant already has a valid exemption, you can upload the supporting evidence directly. If they have not yet completed the HS&E assessment, you can continue the application by selecting one of the pending assessment options: by taking the exam online after submission.

	Applicant Details Qualifications, Documents & Occupational Choices R	eview & Finalise
		app. summary)
Qualific	ations, Documents & Occupational Choices 🔞	OUS STEP FINALISE & REVIE
Pla us	ase fill in all qualifications and documents that you hold that will support your occupation and grading requirements below. I do support your requests and will be displayed on the back of your card where appropriate.	hese qualifications will be
_	Description	Dates
	HEALTH, SAFETY AND ENVIRONMENTAL AWARENESS ③	
	The employee must demonstrate that that they have in-date Health, Safety and the Environment awareness to obtain there new card. complete the application pending them demonstrating their current awareness by undertaking an assessment after completion of you	You can still r application
 ☑ Will Achieve HS&E Assessment Later 	I wish to continue with the employee's application pending them successfully passing an ECS Health, Safety and Environmental Assessment and they will take an at-centre assessment or online assessment following submitting the application	(At-centre 🕤
🕹 Upload	OR, the employee has a valid Health, Safety and Environmental Awareness Exemption and I will upload it here by clicking the Upload button	Exemption ③
+ ADD	QUALIFICATIONS (?)	
	DENTITY VERIFICATION AND PHOTO ③	
	You have an In-Date and Verified Photo on record (Verified ③	07/04/2025 - 07/04/2030
	CRAFT - MAIN OCCUPATION AND GRADING CHOICE ③	
Q SELECT	You need to select a Main Occupation with optional Grading to complete your application (Amaiting Occupational Choice 💿	

To upload your Qualifications & Supporting Documents click on the + ADD button. + ADD You will be presented with 2 options:



Option 1

Use this to upload a certificate or document file. The system will try to automatically read and match the details.

UPLOAD DOCUMENT (AND ATTEMPT AUTOMATIC DETECTION)

- i. Click the upload document option.
- ii. Select the file you want to upload from your device.
- iii. The system will then try to detect and verify the uploaded document/s.

If verified the system will allow you to upload more files or move to the next stage. If uploads are not verified, this could be due to quality of the image not being readable using OCR, or if details on certificate do not match details held on record, the system will give the option to manually upload.

Option 2

If you don't have a digital copy or prefer to type the details yourself, use this option.

i. Click 'Enter the certificate/document details manually' option. ii. Choose the Qualification Awarding Body or Reference Type from the dropdown list. iii. Follow the instructions on screens depending on the chosen Awarding Body or Reference Type. iv. Click check details (with the awarding body).

The system will attempt to verify your qualification; once verified it will pop up guidance advising the qualification has been automatically verified.

v. Click continue.

vi. Follow the instructions on screen.

Successfully read images will appear on screen and system will confirm this has been added to account.

Once all relevant documentations have been uploaded you can select the main occupation choice or grade for your application.





If you have additional occupations, simply click the **ADD** button on the main page of **Qualifications**, **Documents** & **Occupational Choices Section**, you will then have an option to select occupation & grade as above or click **Next** to move to the **Finalise and Review** section.

Review all the details on your application and if the details are correct, click on the Finalise Now button.

Employe Craft - Initia	r Portal Applic al Card 🎥 Rea	ation No. 305430 dy to Finalise) 🔞	65				STEP THROUGH >
FINALISE	NOW The appl Through	ication is ready to be finalised the application. Alternatively,	l. If you wish to make , if you happy with th	e any more changes, please revi nis application, please click the	iew the information in the p Finalise Now button	anels below or Step	~
Application Sta	itus	Applicant - Mr Jef	f Jones				101
Status Created	Ready to Finalise 07/04/2025		Name	Jeff Jones	Card Number/s		
Received		1051	NI Number	AA000000E	DOB	22/09/2023	
Status Changed			Business	01345678901			
			Phone				
		26/09/2023	Business Email	jeff@email.com			



1.4 How to Finalise an Incomplete Application

Step 4 – Finalise & Review

Click **FINALISE NOW**, preview the application summary & scroll to the bottom of the screen and tick the declaration box to confirm you understand the agreement & click the finalise now button as shown below. Your application will now show in the Finalised section.

l confirr	n that, I have read and agree with the terms and conditions and that I understand there is a no refund policy.						
FINALISE NOW							
	K RECHECK JEFF JONES'S APPLICATION						

If you selected the option for the employee to apply pending a Health Safety & Environmental Awareness Assessment you will be prompted to read the guidance below before proceeding.

Complete application pending Health and Safety Assessment						
You can complete an ECS Health, Safety and Environmental Assessment by booking and attending an "at-centre" assessment centre if you wish. Note however that we offer an online Remote Invigilated option to achieve the assessment that will result in a much quicker turnaround time on your application						
I UNDERSTAND I WILL CONFIRM LATER						

You will now need to return to your main dashboard, under the **Applications tab**, select **applications requiring attention**. On the applications ready for ordering click the box next to the applicant number.

1 F	inalise	ed Applications - Awaiti	ng Ordering					1		
0	App. Ref.	Applicant	Employed By	In Group	H&S	Photo	Туре	Applying For Grade	Applying For Occupation	
	2866999	Jones, Jeff			None	OK.	Craft - Initial	Electrical Labourer (2018)	Electrical Labourer (2018)	C 🖥

Select add application to a purchase as highlighted below then you will be prompted to select the order you wish to add them to or create a new order for the application.

1	Finalised Applications - Awaiting Ordering										
1	ADD 1 APPLIC	ATIONS TO A PURCHASE	OUNFINALISE 1 APPLICATIONS								
0	App. Ref.	Applicant		Employed By	In Group	H&S	Photo	Туре	Applying For Grade	Applying For Occupation	
•	2866999	Jones, Jeff				None	OK	Craft - Initial	Electrical Labourer (2014)	Electrical Labourer (2018)	C 🖥



1.5 How to Create a Purchase Order

+ CREATE A NEW ORDER

Click and fill in the details that are requested.

You will have the option to close the order and proceed to payment or close and pay later.

🛒 Select Order to add selected Applications to?	
There are no pending orders available	+ CREATE A NEW ORDER
×CANCEL	

Add all the relevant information and proceed to the payment section by clicking the green button,

CLOSE ORDER & PROCEED TO PAYMENT.

You can also click on the blue button

CLOSE ORDER BUT PAY LATER if you wish to complete the payment later.

Create new order with:	
Your Reference / P.O. Number	Raised at level of
Initial Application JJ	Office Purchase - ECS Check Company 2 Head Office
Billing To Office	Deliver to Office
ECS Check Company 2 Head Office	ECS Check Company 2 Head Office
Accounts contact	Delivery to the attention of
Mr Accounts	Ms Cards

1.6 How to Make a Payment

On the payment screen that appears:

Click Pay and then you will be redirected to the payment screen and your application would be completed and paid for.

Confirm Pay For Order 0?
I wish to pay by Credit/Debit Card Please click Pay Now to be transferred to the Payment Gateway to collect £57.00 from your Credit or Debit card.
TAY EST.00 NOW X CANCEL



1.7 How to Create an Advance Order

Advance orders allow employers to add money to their employer portal account to be used for future card applications. To do this you will need to click on Orders on your Employer Portal dashboard and select Create a New Advance Order.

📜 Orders 🚽
▲ Orders requiring attention
Orders being fulfilled
🗠 Financial History
+ Create a New Empty Order
>> Create a New Advance Order

Next select how many orders you want to purchase and add your Reference Number and Accounts contact details.

Your Referen	ice / P.O. Number		Raised at level of					
123456			Group Purchase - Eastern					
Billing To Office			Accounts contact					
ECS Check 0	Mice 2 - EASTERN	~	Norbit Shenran					
Quantity	Product			Each	Total			
1 -	ECS Card Advance Payment			£250.00	£250.0			

You can select to pay with a credit card using the green button shown above, or via bank transfer.

If you choose the bank transfer option, your order will be on hold until transfer has been received.

Marked for BACS allocation
You have marked this Advance Payment for payment by BACS. Please note that the funds will not be available until the payment has been allocated by the finance department on its receipt. This may take up to 2 weeks. Please annotate your electronic payment with our reference ECS0944490. Failure to use the exact reference number will delay processing your payment.
RETURN TO DASHBOARD MAKE ANOTHER



1.8 How to Add/Modify an Administrator User

On your Employer Portal dashboard under administration click on Administer Users.



Click on ADD USER to add a user or click on the Edit icon to modify a user as highlighted below.

	Administer Users					
	ECS Check Company 2 Ltd					
-	Name +xosuses	Username / Email		Mobile Number	Roles	V
	W, John	test_record@advanc	cedit.ie	353894288777	696	/
	Sherman, Nobit	testrecord010@ecsc	card.org.uk	447843470786	装置職の業務等	/ 0

Next, you will have an option to select an existing user or create a new one. To create one enter all the details before clicking the **ADD/CREATE** button.

+ Add new user to ECS Check Company 2 Ltd?	
A Warning company access will be inherited by all groups and offices within the company. You can refine their access as possible.	by adding the user at the group or office level instead or as well. Please consider keeping company level access as low
Select an Existing User: User Details	
Select User	~
OR Create a New User:	
First Name*	Last Name*
Jeff	Jones
Email Address* (will also be user's username)	Mobile Number* (for two factor authentication)
jeffj@ecscard.org.uk	0123456789d
+ add / create	×CANCEL

The employee will now be added to your portal records.



1.9 How to Purchase Credits

In your Employer Portal dashboard, click on the ECS Assessments tab to log in to the ECS Online Assessment portal.

Employer Portal	Nobit Sherman 😤 📜 🛍 🖒 💄 🗎 🎭 🗸	💒 Employees -	Applications -	🗧 Orders 🕞	Contracts -	CCS Assessments	🍫 Administration 👻
🍘 ECS Check Company 2 Ltd / 🖽 All Offices / 🗒 2 offices - / 😤 Employees / 💄 Current Employees							

Next click the link in the pop-up box that appears as shown below.

Please note: Your username and password are automatically generated as shown below.

Once you click the link you will be redirected to the ECS Assessments portal.

In-Company Online ECS Assessment Access	×
Your Login for the ECS Venue Portal, where you can purchase and create Health and Safety assessment's as required is below. Please use the following URL https://venue.ecstest.org/ Username: YAA Password: eadzqi	

Further details on the assessment system and setting up exams can be found in the **ECS Online Assessments Company Guide**, available to download here <u>https://www.ecscard.org.uk/content/Employers</u>



2. APPENDICES

Employer Portal Icons Explained

**	Full Employee Access: user can view, add, and leave employees and change employee details
7	Full Purchasing Access: user can view purchases, create new purchases, add to existing purchases, and complete purchases
•	Full Applications Access: user can view, fill in and finalise card applications
ப	Full Applications Endorsement Access: user can endorse change in grading and endorse qualified supervisor status
-	Full User Admin Access: user can add and remove users, change user permissions, and reset user passwords
Q o	Full General Admin Access: user can create company groups and can edit employer details
0	Can View Employees Can View Purchases Can View Card Applications
C	Can Reset User Passwords
(0)	Can Use Funds
\checkmark	Can Complete Card Purchases
Ø	Can Change Employee Details Can Fill In Applications
Ð	Can Add Users Can Add Employees Can Create New Purchases
Ō	Can Remove Users Can Remove Employees
Ļ	Can Change User Permissions
QS	Can Endorse Qualified Supervisor Status
**	Can Add/Remove Contract Workers
1	Can Add Subcontractors
*	Can Add to Existing Purchases
↑	Can Endorse Change in Grading
Ē	Can Create Contracts as Client
≣	Can Create Company Groups
	Can Edit Employer Details
6	Can View Contract Details



Portal Sections Explained

	With Cards Expiring Soon	Information on ECS Card holders registered with your company with cards expiring or expired.		
😤 Employees 🗸	Current Employers	Information on ECS Card holders registered with your company.		
	Add New Employee	Quick link to add a new employee to your portal.		
	Applications Requiring Attention	Overview of all applications, started by your company, which are in process but not yet completed.		
🖺 Applications 🗸	Applications Being Produced	The processing team has the application in hand and the status of the application can be seen.		
	Completed Applications	Applications which have been fully processed, where ECS card will be dispatched shortly. Completed applications remain visible for three months.		
	Contracts Being Set Up	These are contracts set up for ECS Check in your account.		
Contracts -	Contracts in Progress	Any contract application in progress will show under here.		
	Contracts Completed	Any processed contracts will show here.		
	Create New Contract	This option allows you to create a new contract for ECS Check.		
	Administer Groups	Basic administration such as amending office contact details, amending office structure.		
Ф _Ф Administration →	Administer Users	Individual users at any company level can be added and managed here. JIB/ECS gives access to 'super users' for each company. Companies should maintain their own users at all subsequent levels including individual employees.		
Tecs Assessments	ECS Assessments	To log in to the ECS Assessments portal where you can book assessments.		
	Orders Requiring Attention	These are outstanding orders that need action to complete.		
	Orders Being Fulfilled	These are orders that have been completed and paid for.		
	Financial History	This is the financial history of all ECS card purchases made on the account.		
📜 Orders	Create a New Empty Order	This option allows you to create an order before applying for an ECS card and the order can be used against a future card application.		
	Create New Advance Order	Advance order allows you to add credits to your account which can be used to pay for ECS cards in the future. The minimum order which can be purchased is 1 credit equivalent to £250.		



is administered by the



in England, Wales & Northern Ireland ecscard.org.uk



