## The Customer – How to Get Started

#### Which actions can be carried out by which user?

| Actions                       | Master Disclosure Manager | Disclosure Manager | Verifier |
|-------------------------------|---------------------------|--------------------|----------|
| Create a Disclosure Manager   | √                         | ×                  | ×        |
| Create a Verifier             | ✓                         | ✓                  | *        |
| Create an Applicant           | ✓                         | √                  | ✓        |
| View the Outcome of the Check |                           | .(                 | ×        |
| & Associated Letters          | <b>v</b>                  | •                  |          |
| Export Information            | ✓                         | √                  | ×        |

#### Accessing OnlineDisclosures

#### For the first time

Once you have received an activation email you will be able to create a password unique to you, to do this follow these steps:

- 1. Open the activation email
- 2. Click the activation link within the email
- 3. Create and confirm a secure password

You will be taken straight into the Online Disclosures site.

#### Signing In

Once you have created a password, to access OnlineDisclosures in the future, you simply sign in:

- 1. Enter the Org Pin
- **2.** Enter the email address the activation email was sent to
- 3. Enter the password you created
- 4. Click Sign In

#### **Navigating Organisation Branches**

If you are a multiple branch organisation and need to locate a particular branch, follow these steps: First Advantage | Online Disclosures

#### 1. Click the Organisation tab

- 2. Click Navigate organisations
- 3. Click the relevant
- Organisation branch
- Click on the name or the
- organisation level, you wish to view
- **5.** Click **View organisation**. The highlighted name is the organisation that will open

To be able to view a particular branch, you must have permission to do so.



## The Customer – How to Get Started

#### **Creating an Applicant**

To add an applicant, ensure you are in the correct organisation branch (see above) and follow these steps:

- 1. Click on Organisation Tab
- 2. Click Organisation Actions
- 3. Click Create Online Applicant
- **4.** Enter the Applicants name and email address
- 5. Click Create applicant
- An activation email will be sent to the email address provided.

| 🐌 First Advantage   0                         | nlineDisclos      | ures                |          |                             |          |
|---|-------------------|---------------------|----------|-----------------------------|----------|
| Applications                                  | Organisations     | Payments            | Letters  | Archive                     |          |
| ( <u>To search/navigate to organisation s</u> | structure         |                     |          | Organisation actions 🔹      |          |
| Demonstration Org > Create Online             | Applicant         |                     | Organ    | isation 🗸                   |          |
| Organisation Details                          | Create Or         | nline Applicant     | Position |                             |          |
| Verifiers & Disclosure Managers               | Applicant name    |                     | Childe   | are Assistant 🗸 🗸           |          |
| Email Management                              |                   | 8                   | Applica  | nt volunteer:               | No       |
|   | Email address     |                     | Product  | type:                       | ENHANCED |
|   |                   |                     | DBS Chi  | Idrens Barred List:         | Yes      |
|   | Confirm email ac  | ldress              | DBS Ad   | ult's Barred List:          | No       |
|   | Verification Meti | hod                 | DBS Ad   | ult First:                  | No       |
|   | Organisation      | ~                   | Work at  | home:                       | No       |
|   | Position          |                     | Workfor  | rce:                        | Child    |
|   | Select Option.    | . 🗸                 | Edit     |                             |          |
|   |                   | icant <u>Cancel</u> | Cre      | ate applicant <u>Cancel</u> |          |

#### **Re-sending an Activation Email**

 Applications
 Organisations
 Payments
 Letters
 Archive

 < To search/novdepte to organisation structure</td>
 Organisation actions

 Construction Org
 Non Activated Users
 Create online policant

 Organisation Details
 Non-Activated Users
 Create online policant

 Verifiers & Disclosure Managerst
 Select
 Org In
 Full Name
 Email
 Created On
 Invited On

 Email Management
 127488
 test applicant
 steephanie humphreysl@gb
 2 5 Mar 2021
 25 Mar 2021
 25 Mar 2021

 Resend Activation Email(s)
 Remove users(s) from fist

If the applicant cannot locate the email or has deleted it in error . Follow these steps:

- 1. Click the Organisation tab
- 2. Click on Organisation actions
- Click Non-Activated users
- 4. Select the relevant applicant
- 5. Click Re-send Activation Email

# An activation email will be sent to the email address provided.

### **Creating Disclosure Managers/Verifiers**

To add a DM or Verifier, follow these steps:

- 1. Click on the Organisation Tab
- 2. Click Organisation Actions
- **3.** Select either Create Disclosure Manager OR Create verifier
- 4. Enter the individuals' full name and email.
- 5. Click Save

## An activation email will be sent to the email provided.

#### 🛞 First Advantage | Online Disclosures

| Applications                              | Organisations               | Payments               | Letters            | Archive                 |
|---|-----------------------------|------------------------|--------------------|-------------------------|
| < To search/navigate to organisation stru | ucture                      |                        |                    | Organisation actions 🔻  |
| Demonstration Org > Create Verifier       |                             |                        |                    | Create verifier         |
| Demonstration org // Create vermer        |                             |                        |                    | Create online applicant |
| Organisation Details                      | Create Verifier             |                        |                    | Non-Activated users     |
| Verifiers & Disclosure Managers           | Verifier Details            | Verifier name          |                    |                         |
| Email Management                          |                             |                        |                    | E                       |
|   | •                           | Require login          |                    |                         |
|   |                             | 😗 Yes <sub> O</sub> No |                    |                         |
|   |                             | Email address          |                    |                         |
|   |                             |                        |                    |                         |
|   |                             | Confirm email addr     | 855                |                         |
|   |                             |                        |                    |                         |
|   |                             | Contact phone num      | ber (Optional)     |                         |
|   |                             |                        |                    |                         |
|   |                             |                        |                    |                         |
|   |                             |                        |                    |                         |
|   | Verifier Address<br>Details | Copy main addre        | 55                 |                         |
|   | DC COND                     | Postcode (Optiona      | 0                  |                         |
|   |                             |                        | Find Enter address | manually                |
|   |                             |                        |                    |                         |
|   |                             |                        |                    |                         |

## The Customer – How to Get Started

#### Viewing the outcome of the check

(Master Disclosure Manager & Disclosure Manager Only)

|             | Applications    | Organisations                               | Payments  | Letters                | Archive            |
|-------------|-----------------|---|-----------|------------------------|--------------------|
|             | 🕞 MR John Smith | 1   |           |                        | Actions 🔻 Withdraw |
| oplications | Name            | Birth surname:                              | Details & | Notes Outcome          | Certificate        |
|             | Details         | Previous forenames:<br>Previous last names: | Applica   | tion Outcome           |                    |
|             |                 | Mothers maiden<br>name:                     |           | Dispatched             |                    |
| o see the   |                 | Gender: Male                                |           | Outcome<br>Disc.       |                    |
|             | Birth           | DOB: 01/01/1987                             |           | Issue Date<br>ISA Reg. |                    |
|             | Details         | Town: Nottingham                            |           |                        |                    |
|             |                 | County:                                     |           |                        |                    |
|             |                 | Country: GBR<br>Nationality:                |           |                        |                    |
| th tho      |                 | Update from DBS:                            |           |                        |                    |

steps: Applications Org

To view the outcome of a check, follow these \_\_\_\_\_First Advantage | OnlineDisclosures

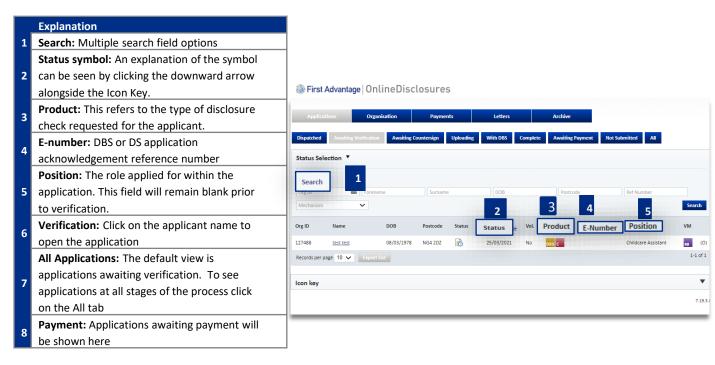
1. Ensure that you are within the Applications

- tab. If not Click Applications Tab
- 2. Click the Complete Tab
- Click on the applicant you wish to see the outcome for
- Click the Outcome Tab

The outcome of the check, along with the certificate number and issue date will be displayed.

#### Using the Home page

Use the key below to navigate the online disclosures home screen



Click to view The Full Customer User Guide

#### Click to view The Verification Process User Guide