## 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	•	v	
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   O	nlineDisclos	ures			
Applications	Organisations	Payments	Letters	Archive	
To search/navigate to organisation s	structure			Organisation actions 🔹	
emonstration Org > Create Online	Applicant		Organ	nisation 🗸	
Organisation Details	Create Or	line Applicant	Position	1	
Verifiers & Disclosure Managers	Applicant name		Child	care Assistant 🗸 🗸	
Email Management		8	Applica	nt volunteer:	No
	Email address		Produc	t type:	ENHANCED
			DBS Ch	ildrens Barred List:	Yes
	Confirm email ad	dress	DBS Ad	ult's Barred List:	No
	Verification Meth		DBS Ad	ult First:	No
	Organisation	~	Work a	t home:	No
	Position		Workfo	rce:	Child
	Select Option	· · ·	Edit		
		icant <u>Cancel</u>			
			G	eate applicant <u>Cancel</u>	

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

Applications	Organisatio	Organisations Payments Letters					Archive		
o search/navigate to organisation s	structure					Organisa	tion actions		
						Create	e verifier		
nonstration Org > Non Activate	d Users					Create	e online appli		
Organisation Details	Non-	Activa	ted Users			Non-A	ctivated user		
Verifiers & Disclosure Managers		0.0		a . h		0 . 10			
	Select	Org Pin 127488	Full Name	Email		Created On	Invited Or		
Email Management			test applicant	stephanie.humphreys1@gb	A	25 Mar 2021	25 Mar 20		

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
- 3. 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
o search/navigate to organisation s	tructure			Organisation actions
				Create verifier
monstration Org > Create Verifier	_			Create online applican
Organisation Details	Create Verifier			Non-Activated users
Verifiers & Disclosure Managers	Verifier Details	Verifier name		
mail Management				
		Require login		
		😦 Yes <sub> O</sub> No		
		Email address		
		Confirm email address		
		Contact phone number	(Optional)	
	Verifier Address Details	Copy main address		
		Postcode (Optional)		
			Find Enter address ma	inually
		Save Cancel		

## The Customer – How to Get Started

#### Viewing the outcome of the check

(Master Disclosure Manager & Disclosure Manager Only)

	Applications	Organi	sations	Payment	s	Letters		Archive
	🕞 MR John Smi	th					Actions	▼ Withdraw
oplications		Birth surname:						1
	Name	Previous forenames:			Details & N	otes Outcome	Certificate	
	Details	Previous forenames: Previous last names:			Applicatio	on Outcome		
		Mothers maiden name:				Dispatched		
see the		Gender:	Male			Outcome		
see the	1					Disc. Issue Date		
	Birth	DOB:	01/01/1987			ISA Reg.		
	Details	Town:	Nottingham					
		County:						
		Country:	GBR					
		Nationality:						
h tha		Update from DBS:						

steps: Applications of

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

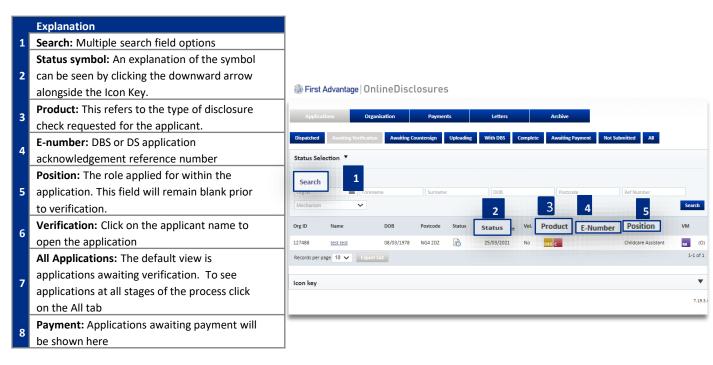
1. Ensure that you are within the Applications

- 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