TotalCRB
Disclosure and Barring Service

The Master Disclosure Manager and Disclosure Manager User Guide

Contact Details

Helpdesk Telephone: 0800 310 1057
Opening Times: 9.00am to 4.30pm Monday to Friday

Email: support@totalcrb.co.uk

TotalCRB
Disclosure and Barring Service

Contents

Click on a question below to be directly to the answer, or just scroll through to be taken through the whole process.

TotalCRB
Disclosure and Barring Service

How do I Activate my Account?

Once you have been added on Online Disclosures, you will automatically receive an activation email.

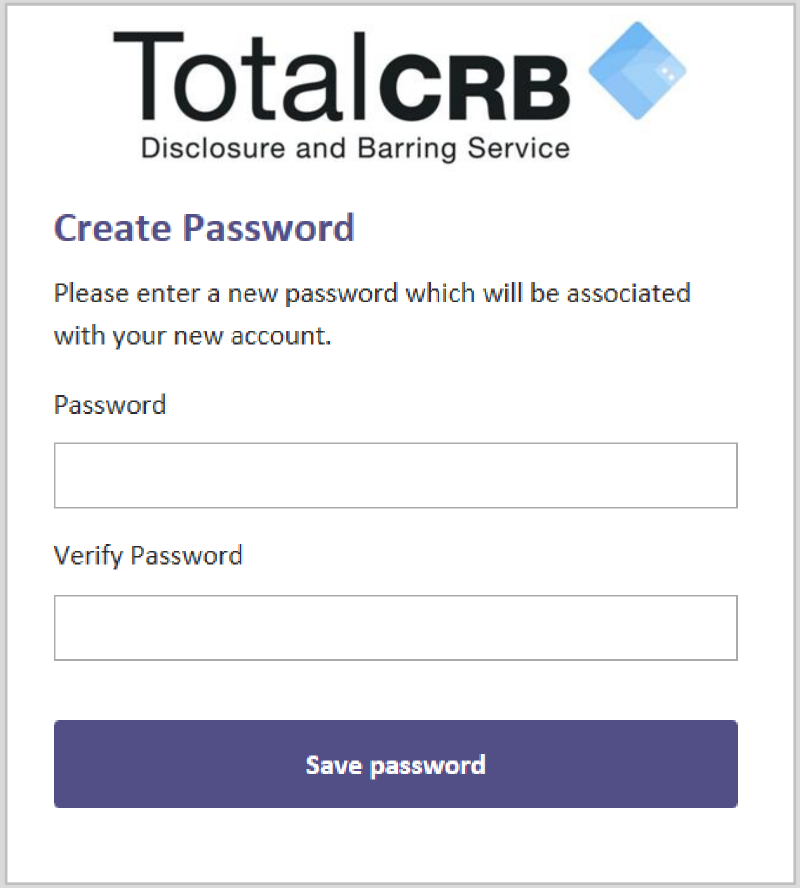
Open the email and click on the link contained. (To see an example of the activation email click the button below.)

You will be asked to create a password. Verify the password by entering it again.

The password **has** to be **at least** eight characters in length using a combination of **UPPER CASE**, **lower case** and **numbers** (0-9). Click **Save Password.**

Once activated you will be directed to the Application tab, Awaiting Verification. This will be your home page.

To access Online Disclosures again in the future you just have to Sign In.



Example Activation Email

Back to Contents

TotalCRB
Disclosure and Barring Service

How do I Sign In?

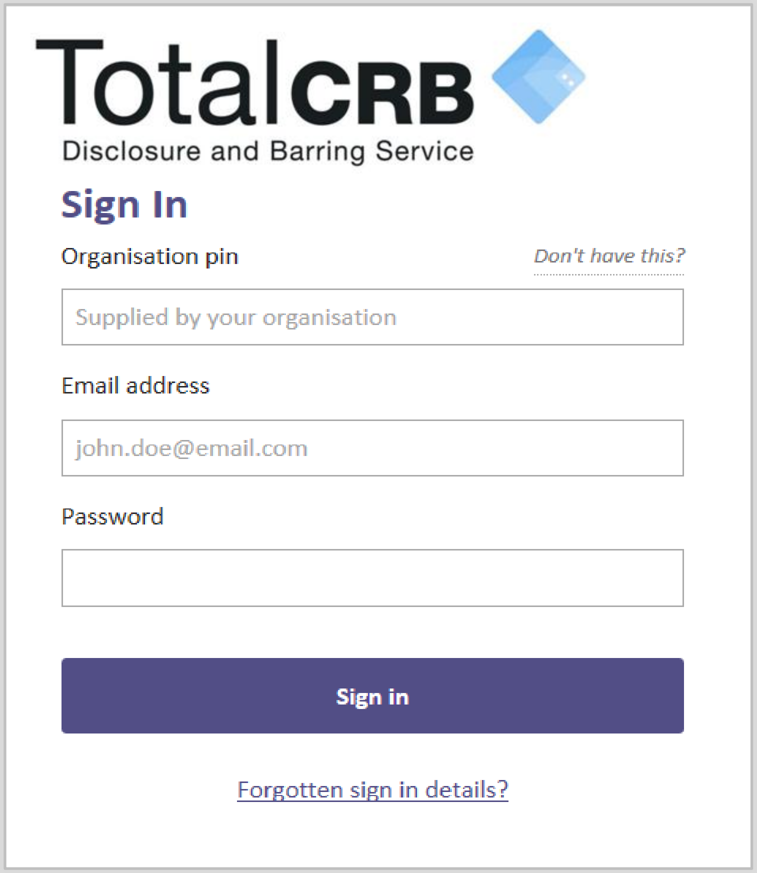
Organisation Pin: This is a number specific to your organisation. You will find it in your activation email.

Email: Enter the email address you received the activation e-mail to.

Password: Enter the password you created for yourself.

Click **Sign In**

Please Note: The password is case sensitive and must be entered **exactly** as you created it.



Back to Contents

TotalCRB
Disclosure and Barring Service

The difference between a Master Disclosure Manager, Disclosure Manager and a Verifier

This table shows what actions can be carried out by different users within your organisation.

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	✓	✓	✓
Export Information	✓	✓	✗

Back to Contents

How do I Create a Disclosure Manager? (Master Disclosure Manager Only)

Click the **Organisation tab** along the top, this will show information about your organisation.

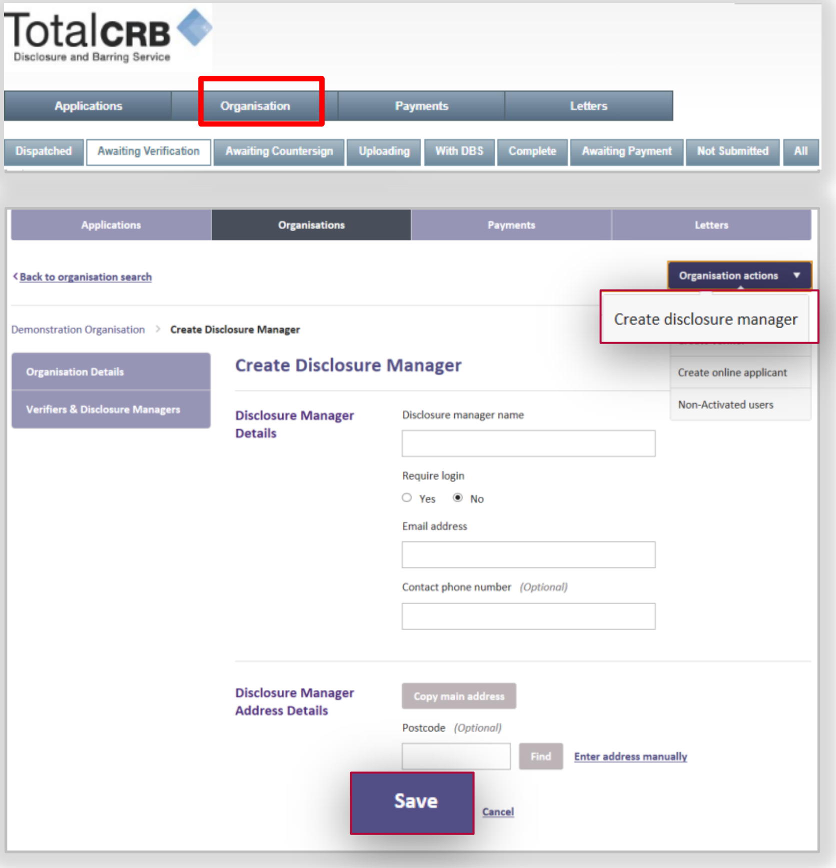
If you are a multiple organisation, search for and select the relevant organisation first. To see how to do this click the button below.

Click the **Organisation tab** and click **Organisation Actions**.

A dropdown list of actions will appear. Select **Create Disclosure Manager**.

Enter the Disclosure Manager's full name and their email address.

Click **Save**.
The Disclosure Manager will be sent an activation email.



How do I search for a particular branch of the Organisation?

Back to Contents

Total CRB
Disclosure and Barring Service

How do I Deactivate a DM?
(Master Disclosure Manager Only)

Click the **Organisation tab** along the top, this will show information about your organisation.

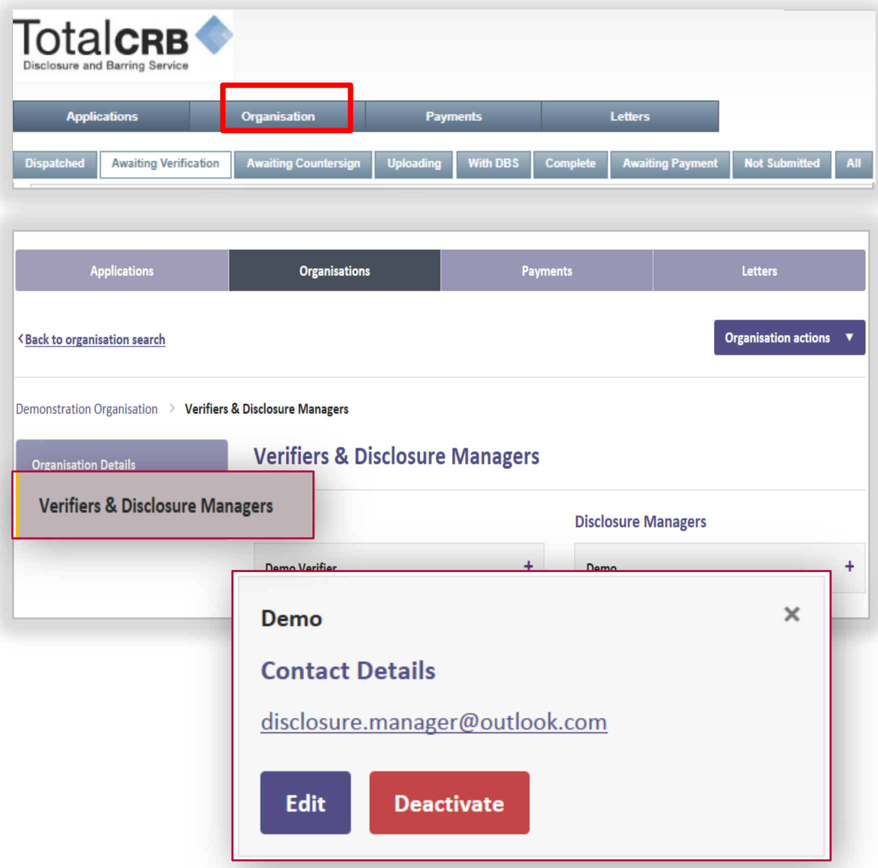
If you are a multiple organisation, search for and select the relevant organisation first. To see how to do this click the button below.

From the list on the left hand side click **Verifiers and Disclosure Managers**

Click the '+' symbol against the name of the verifier you wish to **deactivate.**

Click **Deactivate**.

To **edit** the details, click **edit** and make the changes required.



How do I search for a particular branch of the Organisation?

Back to Contents

TotalCRB
Disclosure and Barring Service

How do I Create a Verifier?

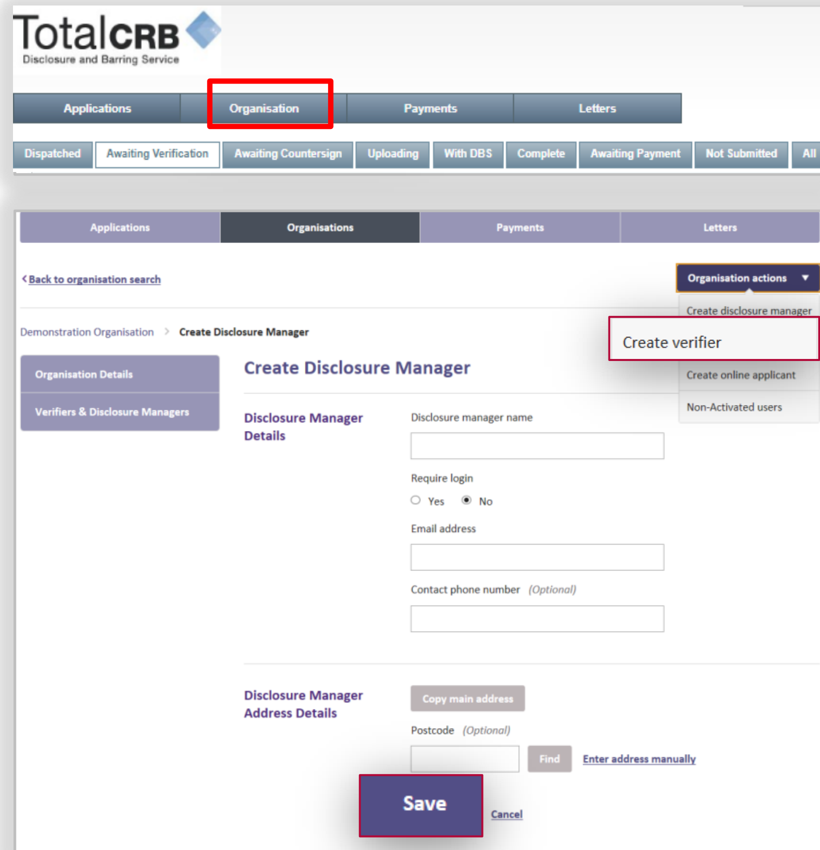
Click the **Organisation tab** along the top, this will show information about your organisation.

If you are a multiple organisation, search for and select the relevant organisation first. To see how to do this click the button below.

Click **Organisation Actions**, from the drop down, select **Create Verifier.**

Enter Verifiers name, their e-mail address. Enter their email **again** to confirm it.

You **can** enter their address details, but this is **not** compulsory. Click **Save.**



How do I search for a particular branch of the Organisation?

Please Note: After the application has been submitted, the applicant will be shown the name and email details of all verifiers.

Back to Contents

TotalCRB
Disclosure and Barring Service

How do I Deactivate a Verifier?

Click the **Organisation tab** along the top, this will show information about your organisation.

If you are a multiple organisation, search for and select the relevant organisation first. To see how to do this click the button below.

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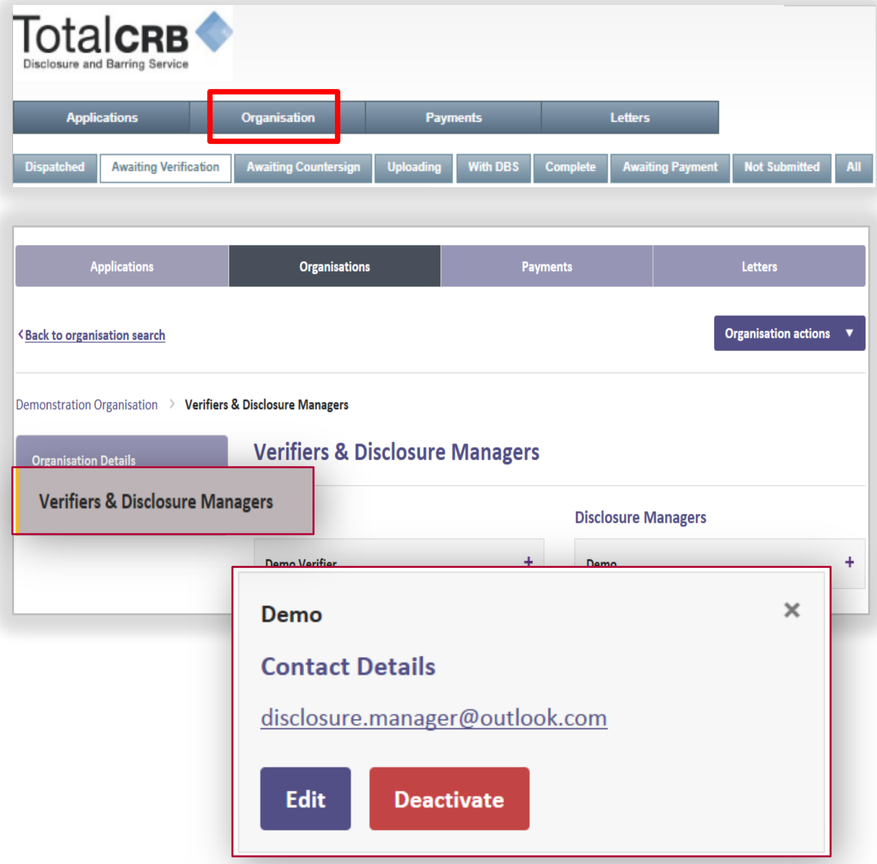


How do I search for a particular branch of the Organisation?

Back to Contents

TotalCRB
Disclosure and Barring Service

How do I make a single/bulk payment(s)?

Click the **Payments** tab.

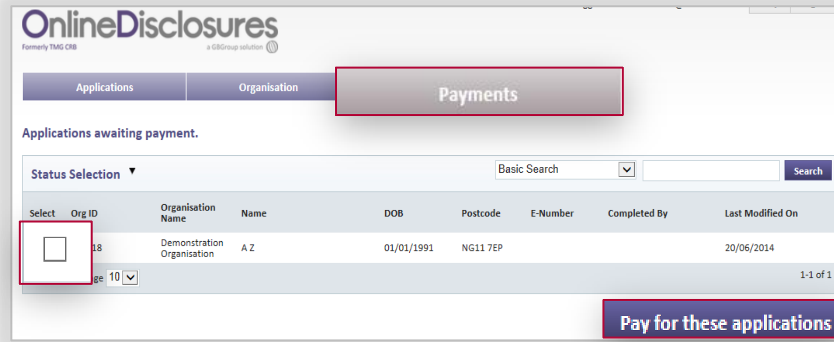
Tick the box alongside the application(s) you want to pay for.

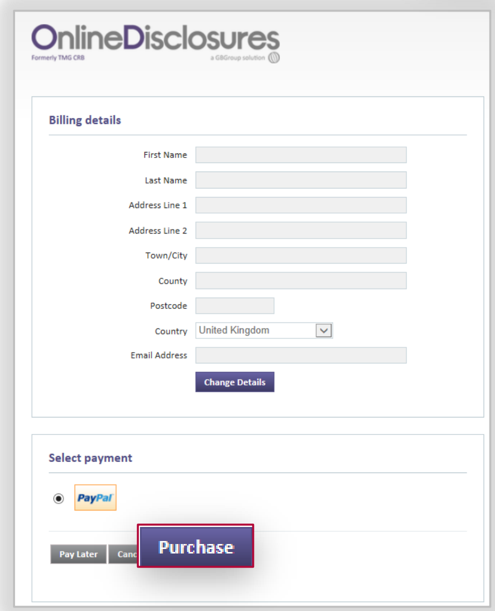
If you wish to make a bulk payment, please be aware bulk payment can only be used for applications under the same Organisation Pin.

Click **Pay for these Applications.**

Enter the billing details. Click **Purchase.**

Please Note: You **do not** need a PayPal account to make a payment. Payment can made by credit/debit card. This will be processed through PayPal.





How do I make a Payment Without a PayPal Account?

How do I make a Payment With a PayPal Account?

Back to Contents

TotalCRB
Disclosure and Barring Service

How do I make a single/bulk payment(s) Without a PayPal Account?

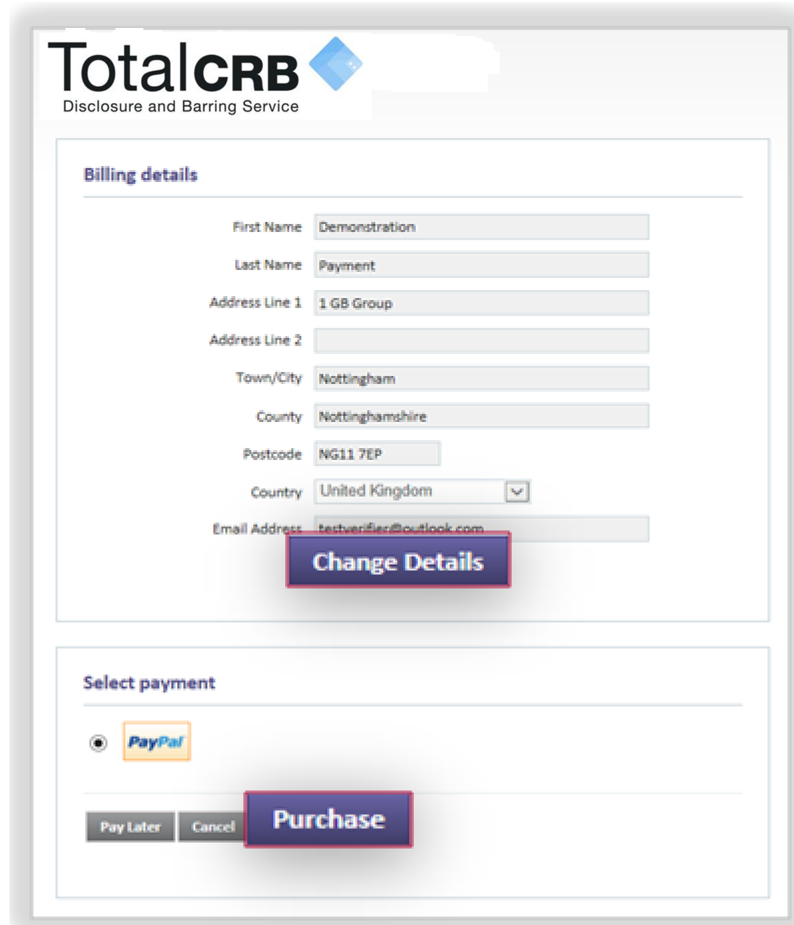
Check the billing details.

If different from the payees **or** no details are visible entered click **Change Details** and enter the correct payees details.

Click **Purchase**.

You **do not** need a PayPal account to make a payment.

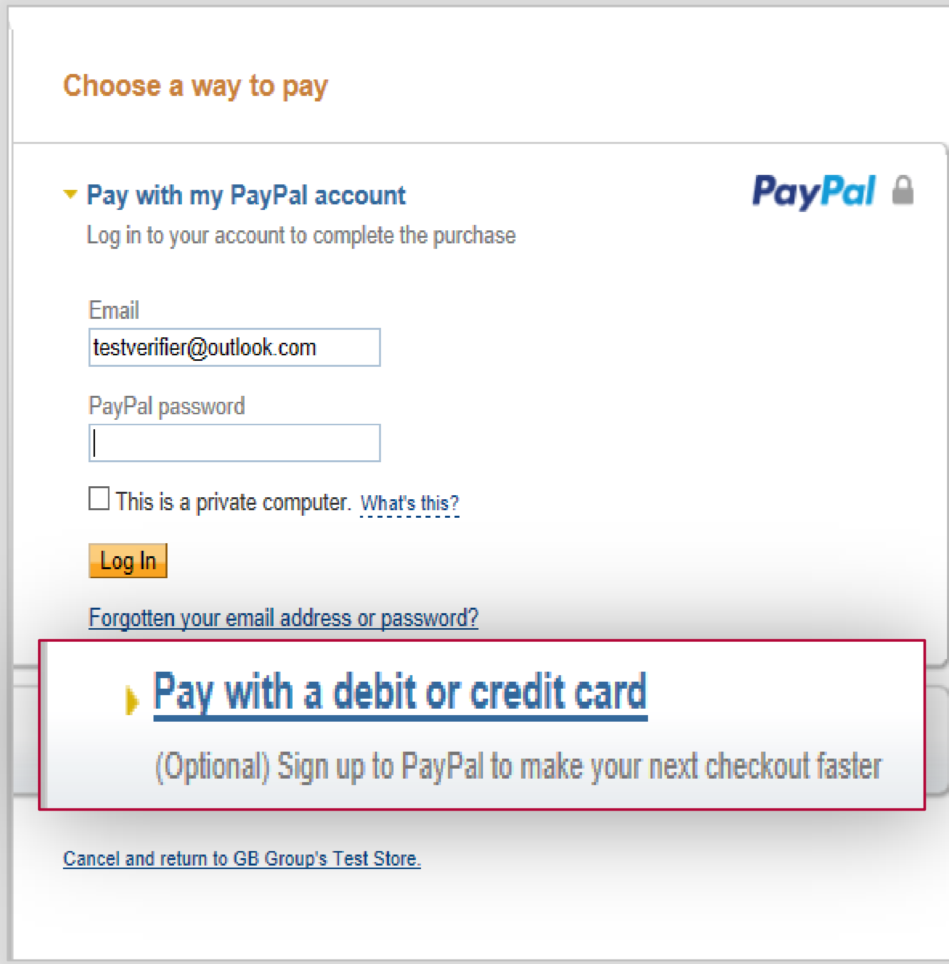
Payment can made by credit/debit card. This will be processed through PayPal.



TotalCRB
Disclosure and Barring Service

How do I make a single/bulk payment(s) Without a PayPal Account?

Click the **Pay with a Credit/Debit card**.



Next

Back to Contents

TotalCRB
Disclosure and Barring Service

How do I make a single/bulk payment(s) Without a PayPal Account?

Select the **type** of **card** being used to make the payment form the drop down list.

Enter the **card details** requested.

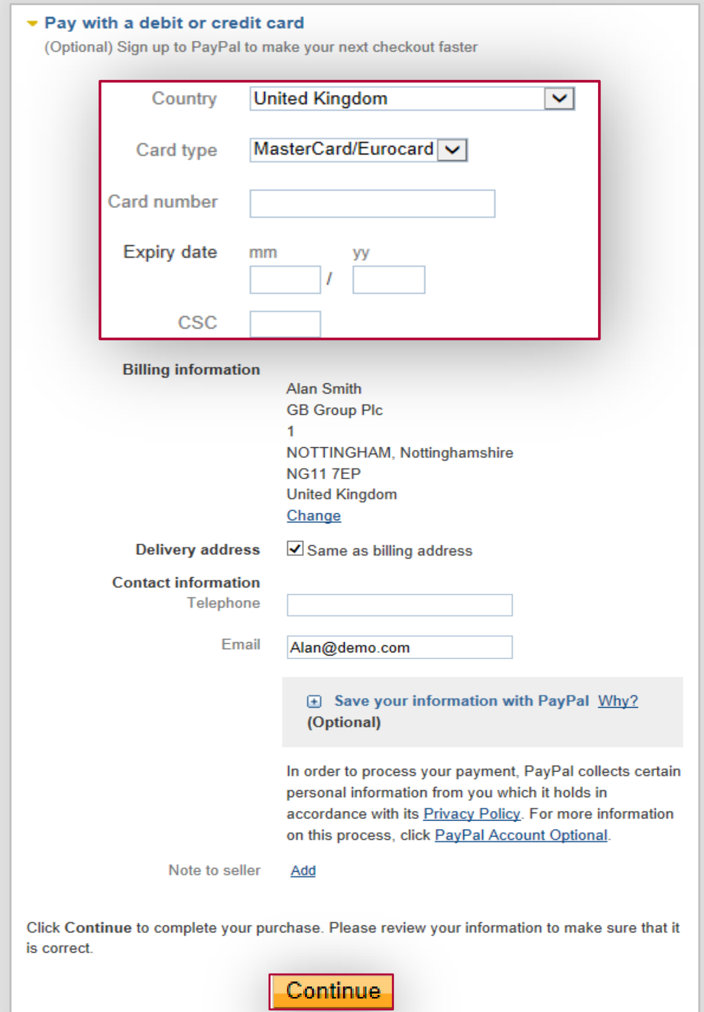
Check the **billing information**.

If the **billing information** is **incorrect** , click **change** and make any necessary changes to the billing information.

Enter a contact telephone number.

Check the **email address**, if **different** delete and enter the **correct** contact email address.

Click **Continue.**



Next

Back to Contents

How do I make a single/bulk payment(s) Without a PayPal Account?

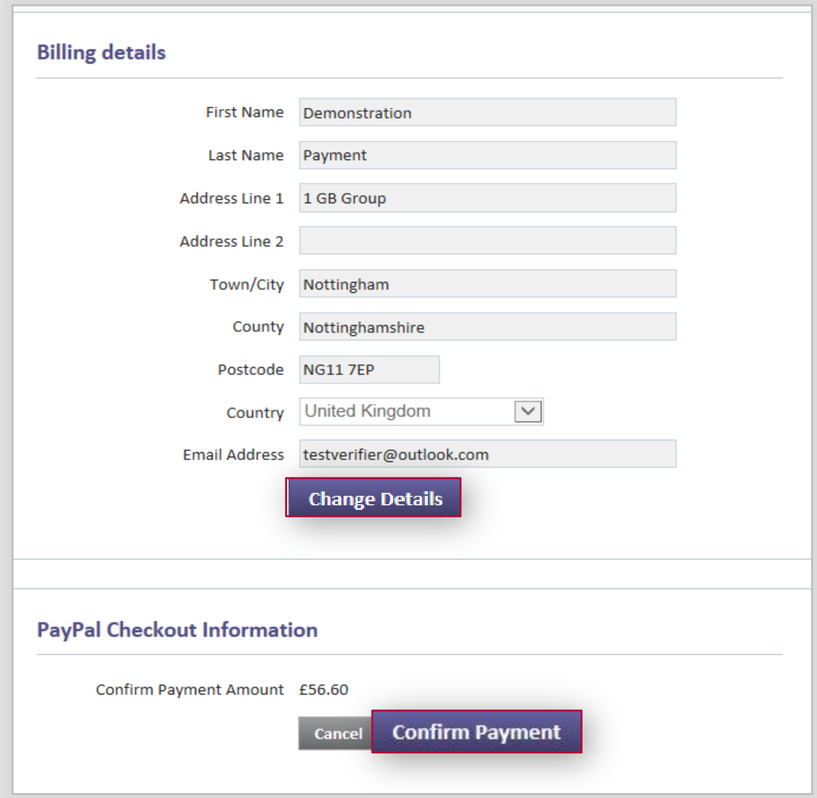
You will be shown the billing details again.

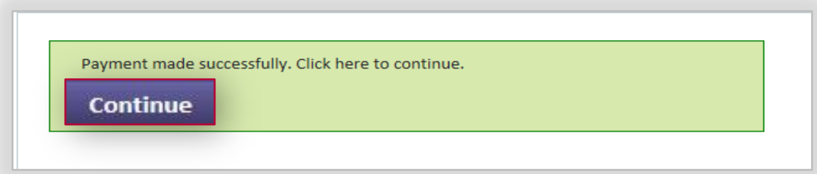
If incorrect, click **Change Details** and update with the correct address.

If Correct, click Confirm Payment.

When the payment has gone through a green box will appear.

Click **continue** to be taken back to the applications page.





How do I make a Payment With a PayPal Account?

Back to Contents

TotalCRB
Disclosure and Barring Service

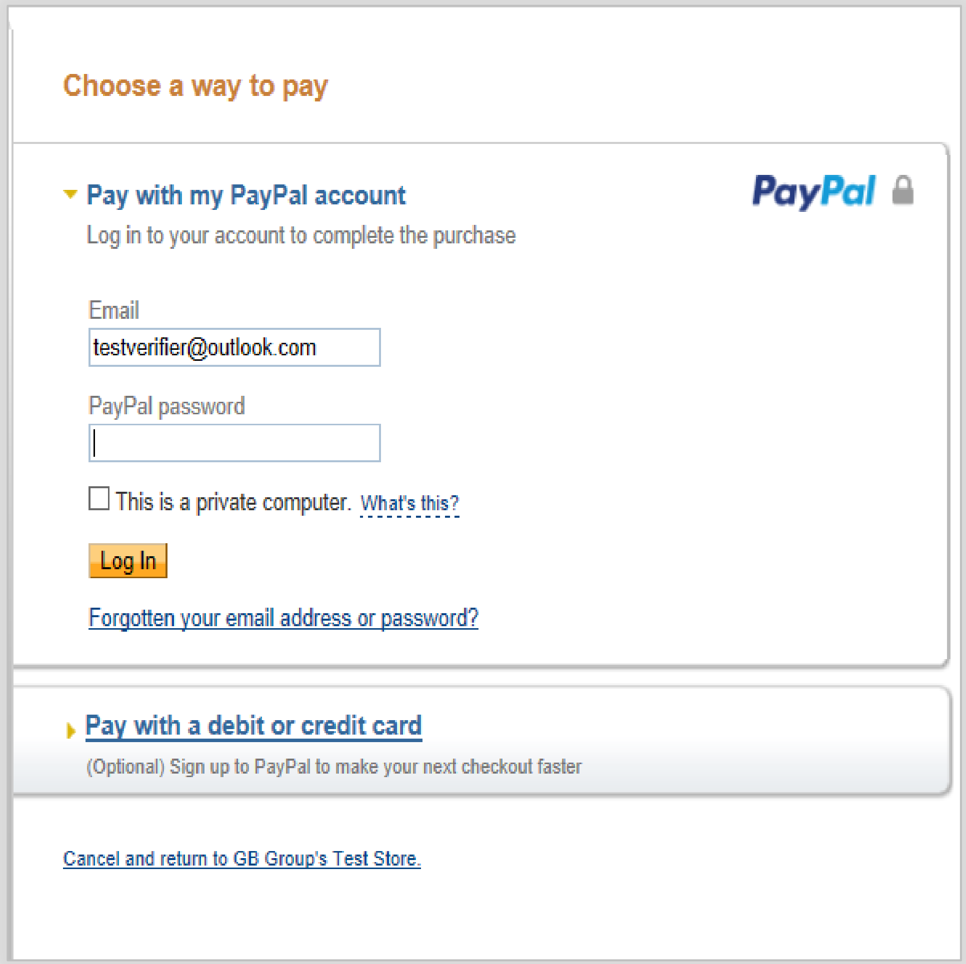
How do I make a single/bulk payment(s) With a PayPal Account?

If you have a PayPal account, check the email is the email used for logging in to PayPal. If not change it and **enter** your PayPal **Password** and press **Login**

Follow the instructions provided by PayPal.

If you **cannot** remember your PayPal account details, click **Forgotten your email address or Password?**

If you **do not** have a PayPal account, click Pay with a Credit/Debit card.



Back to Contents

TotalCRB
Disclosure and Barring Service

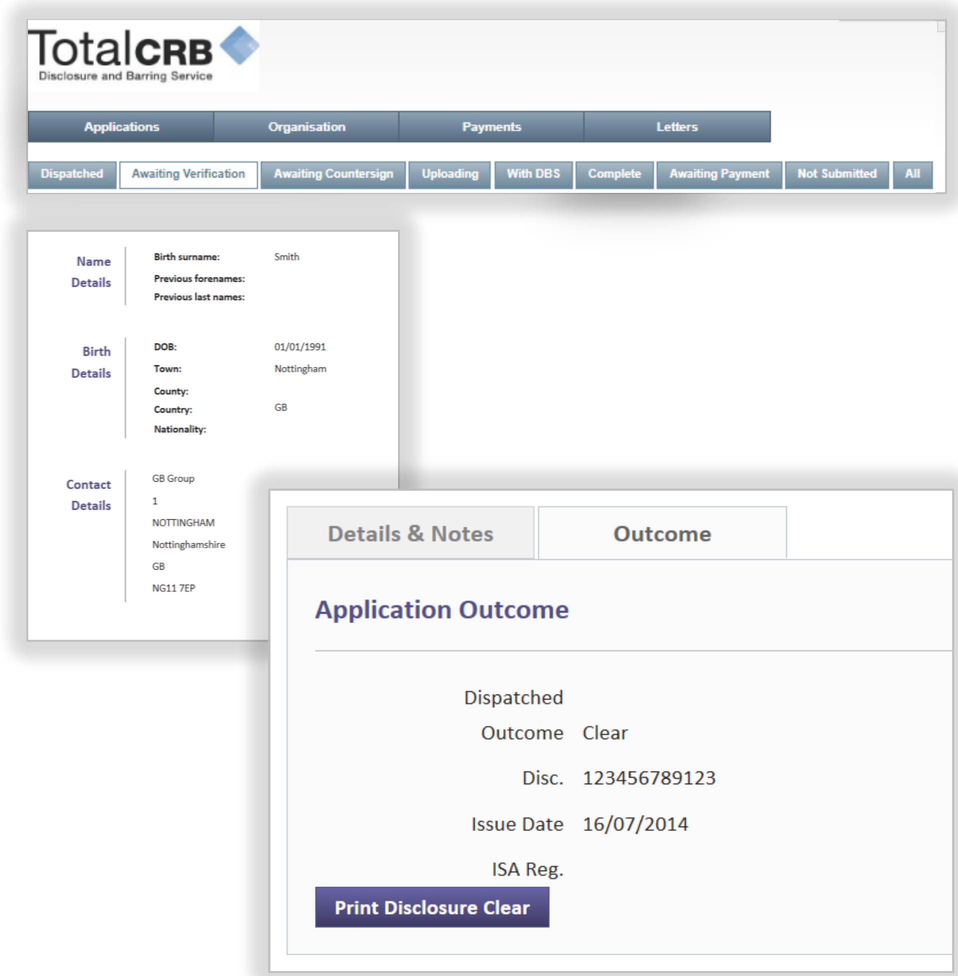
How do I see the Outcome of a Disclosure Check?

To see the outcome click the **Application** tab and then click **Complete.**

Single click on the relevant applicant's name. Click on **Outcome.**

Dispatch: A date will only be shown here for those organisations that have a been set up for certificate retrieval.
Disc: This is the disclosure certificate number.
Issue Date: This is the date the certificate was issued.
Outcome: This will state if the out come is **Clear** or **See Paper Disclosure**

Different actions are required depending on the outcome of the Disclosure Check. **Click** on the relevant buttons to see what action is required.



Clear

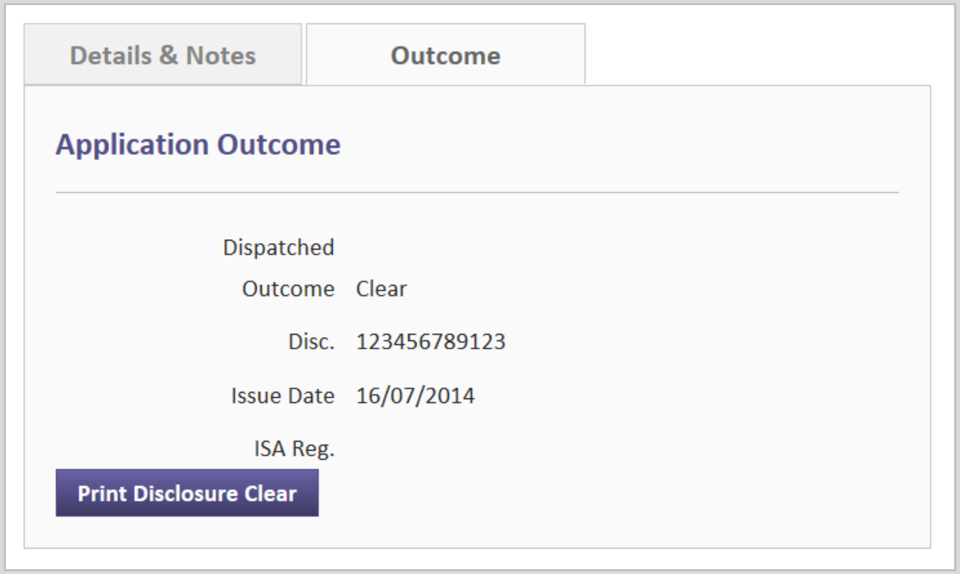
See Paper Disclosure

Back to Contents

What do I do if the Outcome is Clear?

If the outcome of the disclosure check is **clear**, the organisation does not need to see the actual disclosure certificate. You can either work directly from the electronic record **or** open a letter confirming the status as clear.

To do this click the **Application** tab. To show completed applications click **Complete.**



Single click on the relevant applicant's name. Click on **Outcome.**

Click **Print Disclosure Clear.**

The letter will open as a PDF. You can print the document directly from the PDF or save it to your organisations computer.

It is also possible to **Batch Print** the PDF's. This can be done from the Letters tab, click on the button below to see how.

How do I Batch Print?

Back to Contents

What do I do if the Outcome is See Paper Disclosure?

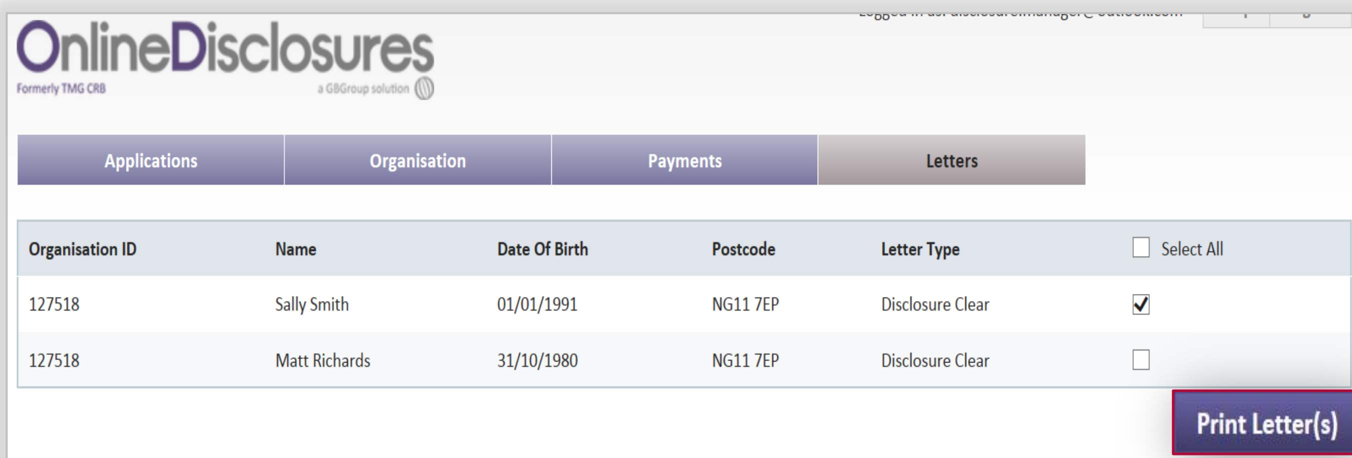
If the outcome of the disclosure check is **see paper disclosure**, the organisation **must see** the actual disclosure certificate. This should be requested from the applicant.

How the disclosure certificate is requested, and how you see this information varies between organisations. Therefore please follow the process set out for your particular organisation. If you are not sure what the process is, please contact your organisations master disclosure manager who will be able to advise you.

Back to Contents

How do I Batch Print?

Being able to Batch Print is useful when managing several applicant accounts making the process of printing these letters faster and easier.



Click the **Letters** tab.

If you want to print all letters for the applicants listed, tick Select All.

If you only want to print certain letters, tick the box alongside the applicants name.

Click **Print Letters.**

Once a letter is printed from the batch list it will be removed. It can however be re-printed individually.

How do I Print Letters Individually?

Back to Contents

TotalCRB
Disclosure and Barring Service

How do I Print Letters Individually?

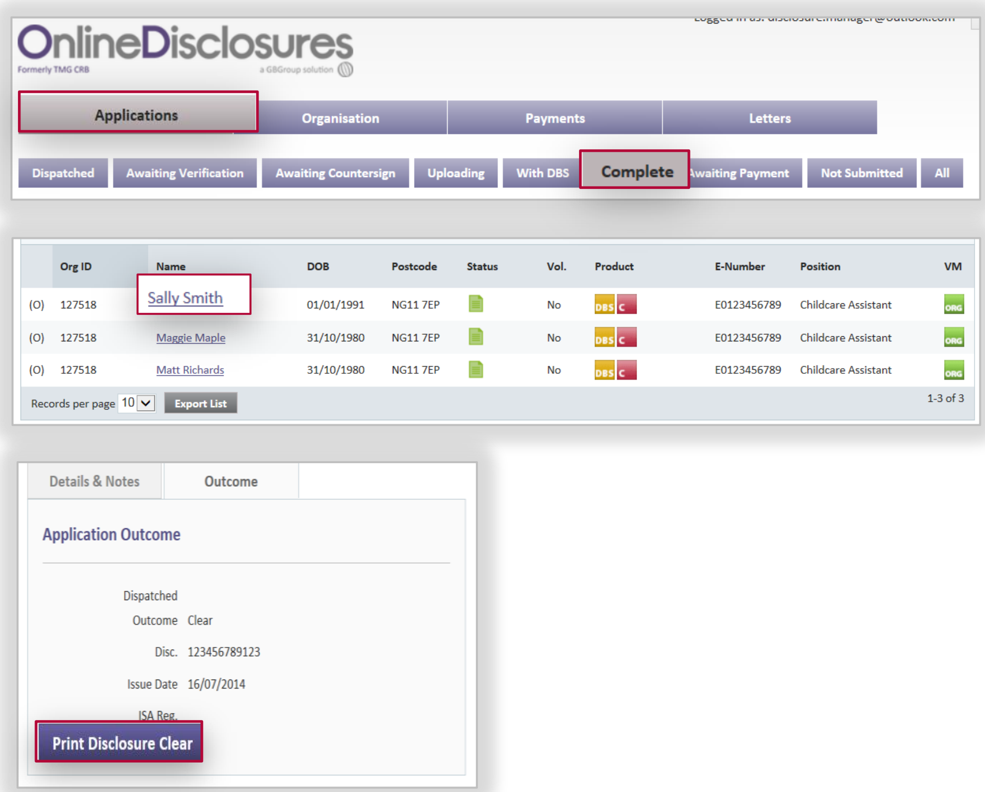
Click the **Application** tab and click **Complete.**

Single click on the relevant applicant's name.

Click on **Outcome.**

Click **Print Disclosure Clear**
The letter will open as a PDF. You can print the document directly from the PDF or save it to your organisations computer.

It is also possible to **Batch Print** the PDF's. This can be done from the Letters tab, click on the button below to see how.



How do I Batch Print?

Back to Contents

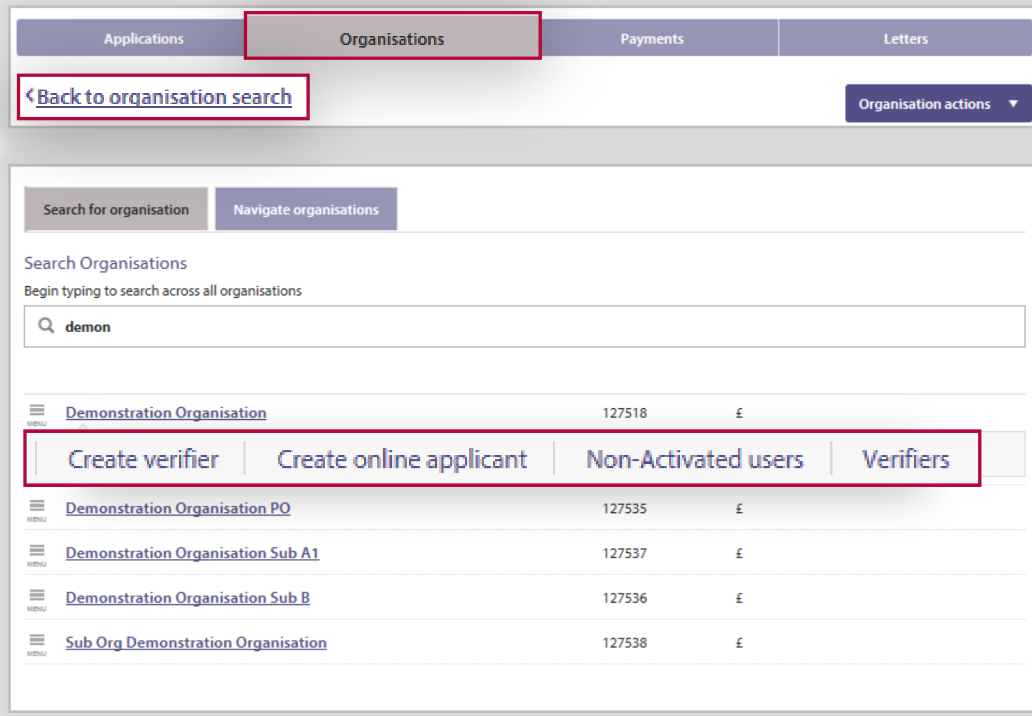
We are a multi-structured Organisation, how do I search for a particular Organisation branch?

Click the Organisation tab and then **Back to organisation search**

Type in the organisation name, all associated organisations will be listed.

To view all of an organisations details, click on the name of the relevant organisation.

To view the quick action list, click on the menu symbol and select the required action.



Back to How do I create a DM?

Back to How do I deactivate a DM?

Back to How do I create a Verifier?

Back to How do I deactivate a Verifier?

Back to Contents

TotalCRB
Disclosure and Barring Service

Example Activation email

The **Organisation PIN** is specific to your organisation.

The **email** address listed, is the **one** you have been **added** as a **verifier against**.

When **accessing** Online Disclosures in the **future**, please **use** this **email**, and the **Organisation PIN** to **Sign In** to Online Disclosures.

To **activate** your **account** click on the **link**.

This is an automatically generated message. DO NOT REPLY TO THIS EMAIL.

Dear John,

You have been registered as a Disclosure Manager for GBG Organisation. An account has now been created for you with Online Disclosures.

Your login details are:
Organisation PIN: 123456
Email address: demoverifier@demo.com

In order to activate your account, you will need to create a password.

Please follow the link below to activate your account:
http://onlinedisclosures.co.uk/ActivateAccount.aspx?OrgKey

For full guidance on the role of Disclosure Manager please visit the Online Disclosures website at: https://gbg.onlinedisclosures.co.uk

If you require any assistance, please contact our helpdesk using the details below.

Thank you for using our online service.

Back to how do I Activate my Account?

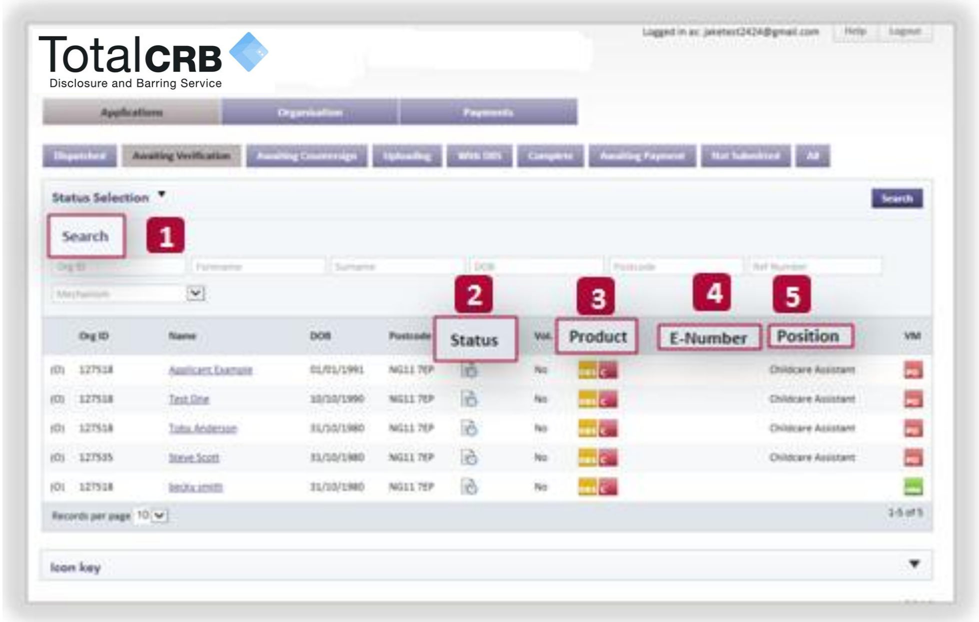
Back to Contents

TotalCRB
Disclosure and Barring Service

My Home Screen

Every time you access Online Disclosures you will land on this Awaiting Verification tab, this screen can be seen below…

1	You can use the search fields to search for a particular applicant.
2	The status of an application is indicated by the symbol in the status column. The Key to these can be seen by clicking the downward arrow alongside the Icon Key.
3	Product, this refers to the type of disclosure check requested for that applicant.
4	E-number, Once the application has been submitted each applicant will be generated a personal reference number. This is listed under E-Number.
5	Position states the role the applicant has within the organisation.



For full details on what information/what action can be carried out with each tab see **Tab Functions** on the next slide.

Next

Back to Contents

TotalCRB
Disclosure and Barring Service

Tab Functions

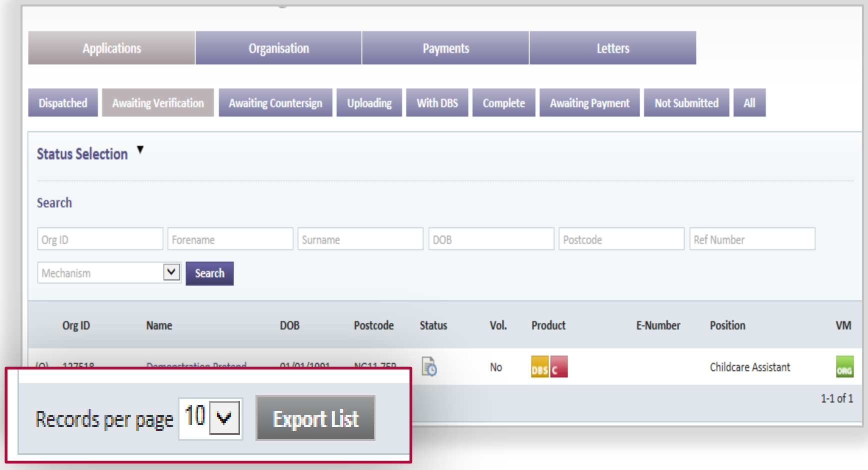
Applications Tab	
All applications can be located within this tab. Use the sub-tabs to navigate between statuses or complete a search using the search fields and Status Selection.	
Awaiting Verification	The applications that have not yet been verified are listed here. Click on the Applicants name to verify their ID documents.
Awaiting Countersign	Applications which have been verified but are waiting for Online Disclosures to countersign them will be listed here. During countersigning applications are **checked** to ensure that there are **no errors** e.g. spelling or contradictions in the name or address
Uploading	When the application has been countersigned it will be uploaded to either Disclosure Scotland or the Disclosure and Barring Service. The applications in the in the queue for upload will be shown here.
With DBS	Once the application has been uploaded to either the Disclosure and Barring Service, or Disclosure Scotland who will be carrying out the background check itself, they will be listed here.
Complete	When the result of the disclosure check has come back from either the Disclosure Scotland or the Disclosure and Barring Service they are considered as complete and will be listed here.
Awaiting Payment	Applications which have not been paid for yet, either by the applicant or the organisation will be listed here. If the Organisation is to pay, then either the Verifier or Disclosure Manager can sign in and select the applications they wish to make a payment for.
Not Submitted	This will show applications that have not been fully completed by the applicant.
Organisation Tab	
Information relating to the organisation and user management can be found here.	
Organisation Details	The default settings for the organisation can be found here
Verifiers/Disclosure Managers	All verifiers and other disclosure managers are listed here.
Organisation Actions	
Create Online Applicant	This is used to register an applicant. The system will then send an activation email to the applicant with instructions on how to register.
Non-activated User	This will show the applicants that have been registered, but have not yet activated their account. From here you can re-send activation emails, if for example the applicant does not have access to the other email previously used or the y have deleted it.
Payments Tab	
Only applications awaiting payment by the Organisation are listed here. Payment can be made for single or multiple applications which are listed under the same Organisation Pin	

Back to Contents

TotalCRB
Disclosure and Barring Service

How do I export Information?

Exporting information allows you to see and manage all the information on file for each applicant.



Click on the relevant tab, select how many files you wish to download **(up to 50)** and click **Export.** This will generate an excel file, which you can then filter and mange as you wish.

The information shown in the export file is listed below.

- Org ID
- Organisation
- First Name
- Last Name
- Personal Ref No
- Address 1
- Address 2
- Town/City
- County
- Post Code
- Date of birth
- Issue Date
- E number
- Disclosure Number
- Outcome
- ISA Reg No
- Dispatched Status
- Status Date Change
- Basic Standard Enhanced
- Enhanced/ISA
- Children’s Workforce
- Vulnerable Adult Workforce
- ISA Children’s Barred List
- DBS Adults Barred
- List
- Work at Home DBS
- Adult First Is Volunteer
- Applicant Email
- Verifier Name
- Created By Email
- Disclosure Printed
- Applicant Position

Back to Contents

TotalCRB
Disclosure and Barring Service

If you are still unsure about what to do, you can call or email us...

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Email: support@totalcrb.co.uk

Back to Contents