

## APCS Management Reports

### Introduction

Welcome to APCS's Management Reporting Suite. This has been designed to assist ID Checkers and Customers to determine the status of applications for Disclosure and Barring Service Disclosures; from the application start date, to the date that the disclosure is issued (including all of the stages in between).

It is worthwhile noting that this process is complex and has many stages. As such, APCS strives to provide information that is as accurate as possible, but there is a natural time lag whilst applications are being downloaded and processed. These statistics are normally updated every 30 minutes in a normal working day, but this may be longer during weekends and Bank Holidays.

### Where Are They?

To get to the Management Reports click the 'Management Reports' button on the left hand side of the main screen on <https://www.onlinecrbcheck.co.uk>



The screenshot shows the 'Criminal Record Checks' website. The left sidebar contains a navigation menu with the following items: Home, About Us, Policies, My Account, Log in, Contact Us, Management Reports (highlighted with a red circle), Employer Enrolment, and a Help section with contact numbers. The main content area is titled 'Welcome to Online CRB Check.co.uk' and includes a 'Create Management Reporting Account' section with fields for Email Address, Create Password, and Confirm Password. Below this is a 'Login to existing Management Reporting Account' section with fields for Email and Password. A 'Forgotten Password' link is also present. The footer contains links for Home, About Us, Policies, and Acceptable ID Documents, along with the APCS logo and contact information.

Figure 1. Loading the Management Report screen

## Registering your Email

Before you can use the system, you must register your email address. This is so that we know which Applicants belong to you or if you manage more than one Administrator/ID Checker, we can offer you a report to view their Applicants.

You do this by Creating a Management Reporting Account:

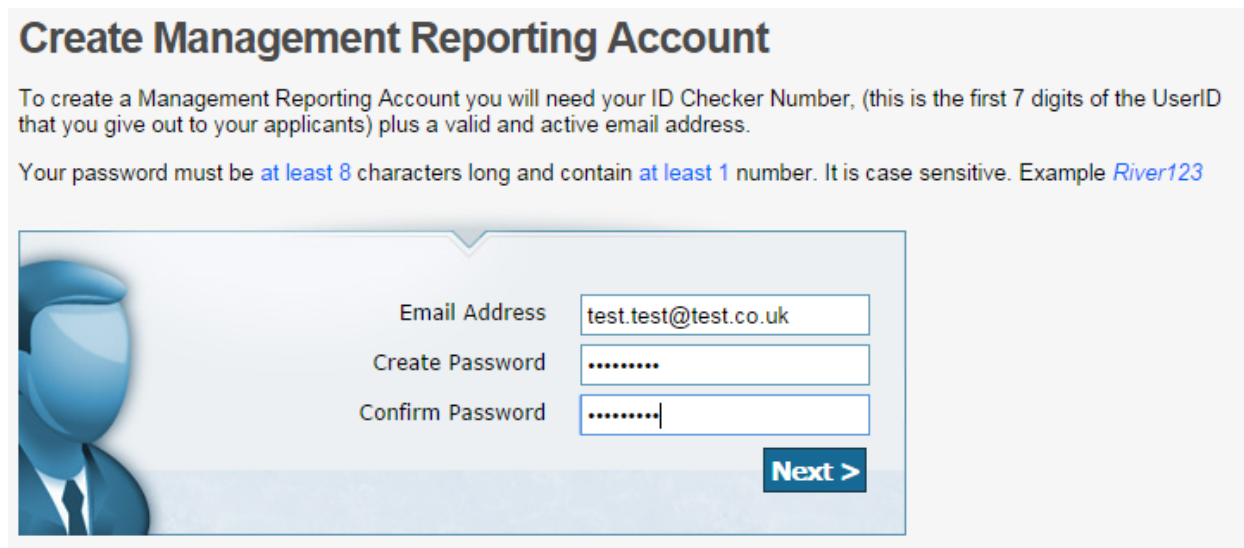


Figure 3. Creating a Management Account (Part 1)

Enter your email and a password and press the Next button...

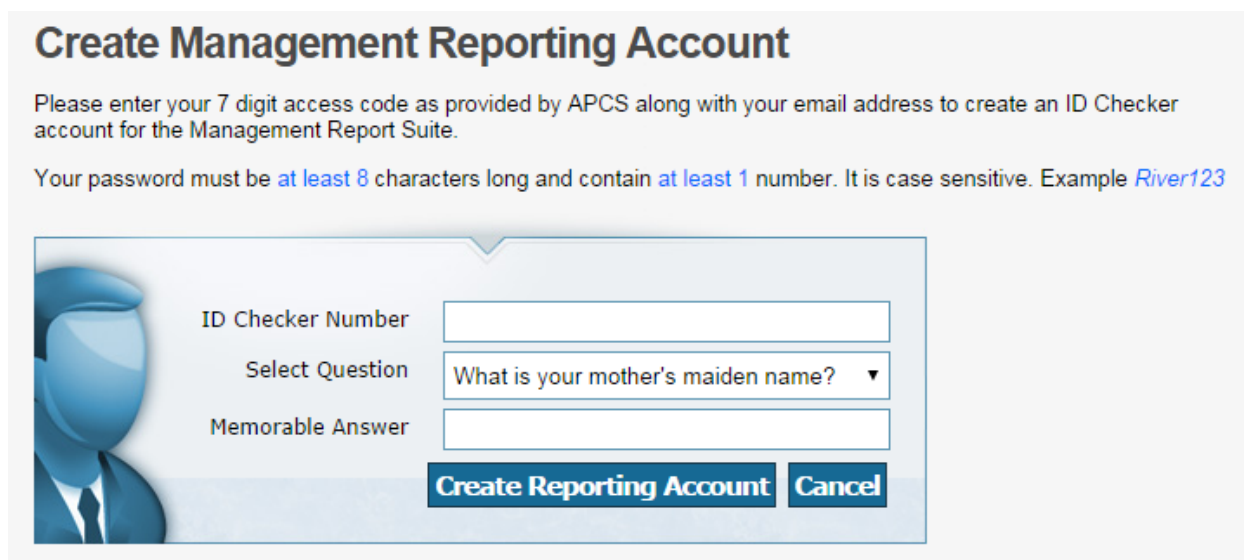


Figure 4. Creating a Management Account (Part 2)

Enter your ID Checker Number (this is the 7 digit number allocated to you that you start all of your applications with) such as '1234999'

Choose a memorable question and provide your memorable answer

Press the 'Create Reporting Account' button.

Provided that all of the information that you provided was correct, you will now have access to the Management Reporting System. As this information is confidential, we don't want other people seeing your Applicants data so we have had to build in a strict validation procedure.

## Overview

In order to view these Management Reports, you will have already registered your ID Checking Email and successfully logged into the Management Suite. Depending on your role within your organisation, you will either be given an ID Checker or Manager privileges to the Management Reports. The difference between the two is that an ID Checker can only review the status of the Applications that they are responsible for, whilst a Manager can review all of the applications from all of the ID Checkers in their organisation.

The reporting suite is identical in terms of the level of detail provided to each application, and the functionality is the same. This will be described in more detail later in this document.

## Menu Report Selector

This is the current full menu of reports/functions available. You may not have all of these depending on the Management Reporting Role that has been set up for you, or whether your organisation has requested the 'Single Central Record'. This is mainly for school and the help for this is covered under a separate help guide.

The 3 main Management Reports as shown below:



Figure 5: Management Report Selector

**Check Single Application** is a quick and simple search that produces the results for one application at once. This is available to ID Checkers and Managers. There is a dropdown list that details the Applicant's User ID (10 digit number) plus the Applicant's Name in the format Surname, First Name and Second Name.

**Check Multiple Applications** report provide a grid-like table containing the applications that you are responsible for as an ID Checker. If you have got more than one OnLine Code (7 digit numbers which you add the additional unique 3 digit applicant number), you will be able to select either all or a specific code to filter the applications.

**All Applications** report is identical to the Check Multiple Applications report but the dropdown list allows a Manager to see all of their ID Checkers, and consequently, all of their ID Checker's applications. If you do not have a Manager's permission then you will not see this button on the Report Selector.

## Understanding the Reports

The reports have been designed to clearly show in an instance, the status of an application. In all three types of report, dates will get populated in the relevant places as and when one of the stages has been completed. The following terminology has been used in all of the reports:

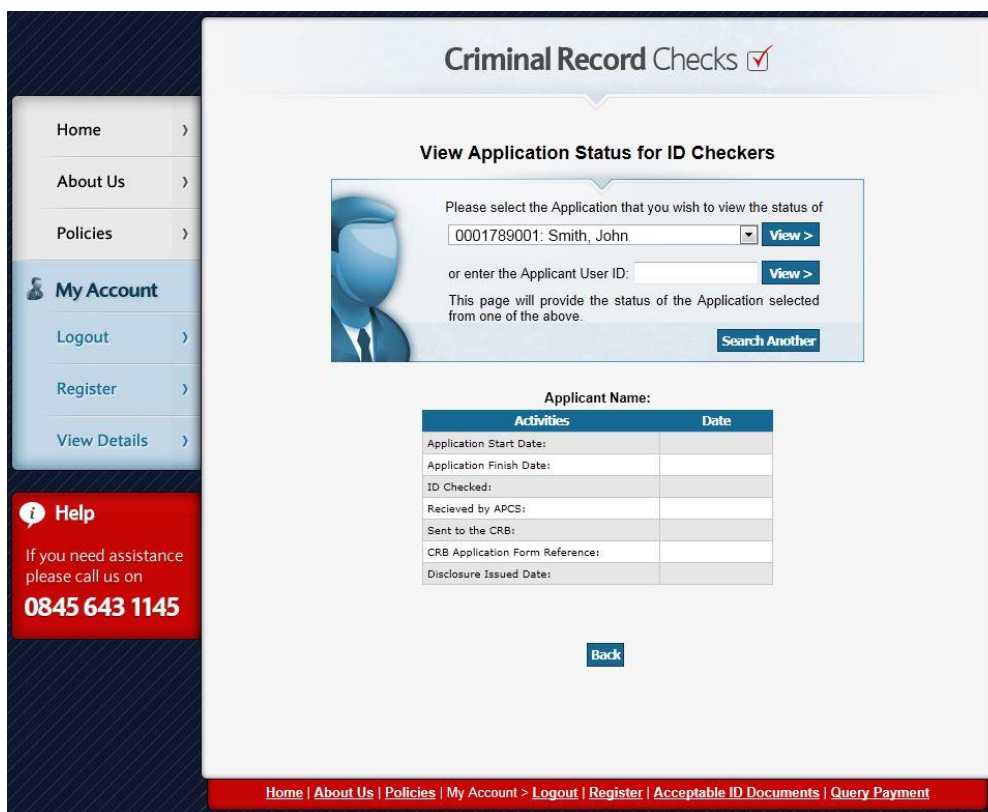
### Check Single Application

- **Application Start Date** – the start date that the applicant first logged in the online system
- **Application Finish Date** – this is the date that they clicked the 'Declaration' button confirming that they have completed the application
- **ID Checked** – the date when the ID Checking Process has been completed
- **Received by APCS** - this is the date that APCS has received the ID Checked application
- **Sent to the DBS** – the date that APCS sent the processed application to the DBS
- **DBS Application Form Reference** – DBS Application Reference Number, this is the reference provided by the DBS which is unique to each DBS Application. You can use this reference and the date of birth of the applicant to log into the DBS's own management reports to check the status of the DBS disclosure process. (See Extra Functionality at the end of this document).
- **Disclosure Issued Date** – date that the completed disclosure is issued to the Manager of your organisation.

### Check Multiple Applications

- **User ID** – the 10 digit unique Application login number
- **Applicant Name**
- **Started** – the start date that the applicant first logged in the online system
- **Finished** – this is the date that they clicked the 'Declaration' button confirming that they have completed the application
- **ID Checked** – the date when the ID Checking Process has been completed
- **Sent CRB** – this is the date that APCS has received the ID Checked application, processed it and sent it to the DBS
- **DBS App Ref No** – DBS Application Reference Number, this is the reference provided by the DBS which is unique to each DBS Application. You can use this reference and the date of birth of the applicant to log into the DBS's own management reports to check the status of the DBS disclosure process. See Extra Functionality at the end of this document.
- **Disclosure received**
- **Disclosure Issued** – date that the completed disclosure is issued to the Manager of your organisation.

## Check Single Application



**Criminal Record Checks** ✓

**View Application Status for ID Checkers**

Please select the Application that you wish to view the status of

0001789001: Smith, John [View >](#)

or enter the Applicant User ID: [View >](#)

This page will provide the status of the Application selected from one of the above. [Search Another](#)

**Applicant Name:**

Activities	Date
Application Start Date:	
Application Finish Date:	
ID Checked:	
Received by APCS:	
Sent to the CRB:	
CRB Application Form Reference:	
Disclosure Issued Date:	

[Back](#)

[Home](#) | [About Us](#) | [Policies](#) | [My Account >](#) [Logout](#) | [Register](#) | [Acceptable ID Documents](#) | [Query Payment](#)

**Figure 6: Check Single Application**

This is straightforward. You can either select one of the Applications from the dropdown list or enter a specific User ID if you have handled a large number of applications and the drop down list is long.

Press the 'View' button to show the required information. You can view another Application by pressing the 'Search Another' button.

Press the 'Back' button to log out when you have finished.

## Check Multiple Applications/All Applications

### Criminal Record Checks

#### View Multiple Application Status's for Customers

Active ID Checker: (1988444) Paul Cutts

☐ Search in Archived Records?

User ID	Applicant	Started	Finished	ID Verified	Sent CRB	DBS Ref No	Issue Date	Status
No Filter	No Filter	No Filter	No Filter	No Filter	No Filter	No Filter	No Filter	Select...
1988444765	FourFourFour SevenSixFr	06/05/13	06/05/13	06/05/13				Recieved by APCS
1988444888	Paul Cutts THIS IS A TES	22/11/12						Application Started
<div> <div>Disclosure Level</div> <div>Disclosure Number</div> <div>Disclosure Issue Date</div> </div>								
1988444982	NineEightTwo FourFourFc	27/02/13	27/02/13					Rejected by ID Checker
1988444988	DONOTSUBMIT THISISAT	08/02/13	08/02/13	08/02/13				Application Withdrawn
1988444989	THISISATEST DONOTSUE	08/02/13	08/02/13	08/02/13				Application Withdrawn
1988444990	DONOTSUBMIT THISISAT	08/02/13	08/02/13	08/02/13				Application Withdrawn

Records per page: 10 Apply Filter | Hide Filter Records: 11 - 16 of 16 - Pages: 1 2

**ID Checking Link:** You can Click on a specific Application to go to the associated ID Checking Page if its Status is 'Awaiting ID Checking'.

**Functions**

[Run Report](#)
[Export to Excel](#)
[Print Current Page](#)
[Print All Pages](#)
[DBS Tracking Service](#)
[Back](#)

When Printing: set printer preference to landscape for best results.

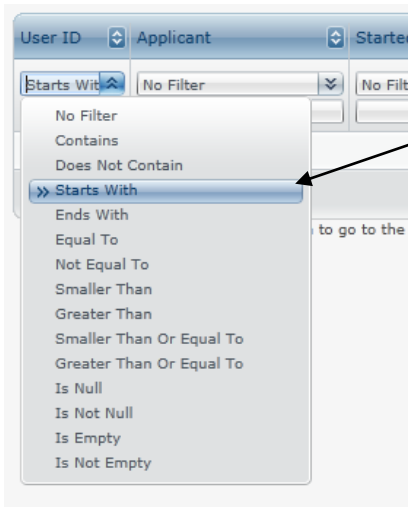
**Please Note:** Any recent changes (within the last hour) may not be reflected in the reports above.

[Home](#) | [Help with Management Reports](#)

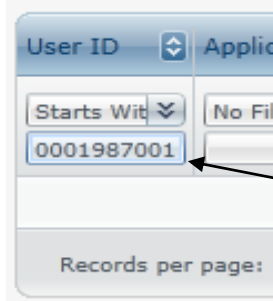
**Figure 7 Multiple Applications/All Applications screen**

The dropdown list filters the applications shown in the table. This can be set to 'All ID Checkers' if you have more than one OnLine code, or if you have logged in with Manager privileges. On selecting an OnLine Code (displayed as '(0001987) IDCheckersName'), the Management Report will collect the most upto date information that is stored on the system and present it in the table.

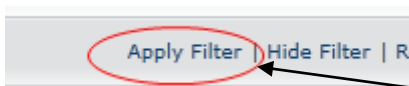
Once data is populated in the table, you can use the filters to fine tune the search for the specific application.



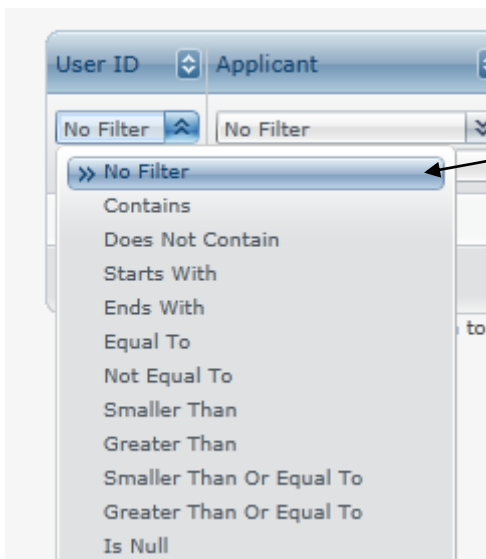
First select the filter search criteria. The main ones to use will be 'Starts With' or 'Contains'.



Then enter the text that you want to search on, in the empty text box below. In this example, the search is for User ID 0001987001. On entering the search text and pressing the enter/return key on your keyboard, the search will automatically start. Alternatively you can press the 'Apply Filter' as described below.



Click the Apply Filter text in the middle of the table footer to instigate the search. If no results are found then the table will show this.





To clear a Filter, select the 'No Filter' option from the dropdown list.



To look for Applications with a specific status, say 'Awaiting ID Checking' you can use the predefined dropdown list under the 'Status' column. If you want to search for more than one status, hold the 'Ctrl' key on your keyboard when clicking specific status's that you require. Normally the status are progressive so if you search for an application that has been ID Checked, it will already have been started and finished.

### Expanding the record...

There is a small plus '+' sign on the left hand side of each record. If you click this you can see this information regarding the disclosure. (e.g. Standard, No.000000123456, 01/03/2014) when we receive them back from the DBS.

	1988444765	FourFourFour SevenSixFi	06/05/13	06/05/13	06/05/13	
	1988444888	Paul Cutts THIS IS A TES	22/11/12			
<div> <div>Disclosure Level</div> <div>Disclosure Number</div> <div>Disclosure Issue Date</div> </div>						

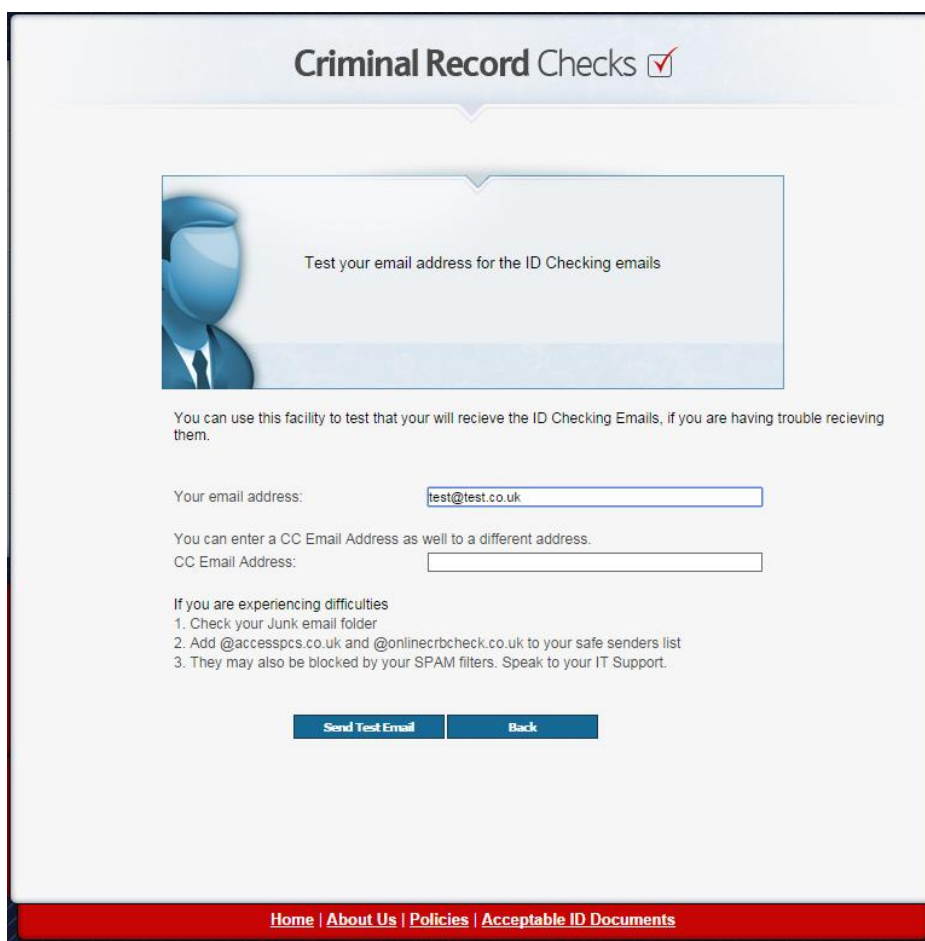


## Applications Awaiting ID Checking

If you have lost the original ID Checking email, or need a quick way of getting to the ID Checking Page for a specific application, search for the Applicant using the filters or status selector (set to 'Awaiting ID Checking') and click anywhere on the row for this application. If its status is 'Awaiting ID Checking', the ID Checking page is automatically loaded into a new window of your web browser. You can then proceed as normal as if you had followed the link provided in the ID Checking email.

## Testing your ID Checker email

We have added this facility so that you can test that the system can send you're the ID Checking emails. This may be blocked due to your email providers spam filter or that you have not added us to your safe senders list.



**Criminal Record Checks** ✓

Test your email address for the ID Checking emails

You can use this facility to test that you will receive the ID Checking Emails, if you are having trouble receiving them.

Your email address:

You can enter a CC Email Address as well to a different address.  
CC Email Address:

If you are experiencing difficulties

1. Check your Junk email folder
2. Add @accesspcs.co.uk and @onlinecrbcheck.co.uk to your safe senders list
3. They may also be blocked by your SPAM filters. Speak to your IT Support.

[Send Test Email](#) [Back](#)

[Home](#) | [About Us](#) | [Policies](#) | [Acceptable ID Documents](#)

**Figure 8.0 Checking your email works**

The email that you logged in with will automatically appear. You can add a second email to check that works as well. Just click the Send Test Email button.

## Extra Functions

**Functions**

Run Report	Export to Excel	Print Current Page	Print All Pages	DBS Tracking Service	Back
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When Printing: set printer preference to landscape for best results.

**Please Note:** Any recent changes (within the last hour) may not be reflected in the reports above.

The following buttons are provided to assist you.

**Export to Excel** will create an Excel Spreadsheet of all the applications shown and will automatically download it to your computer. You can either save it or open it as prompted by your operating system.

**Print Current Page** will print the records shown on the screen to your local printer.

**Print All Pages** will print all the Applications for the filtered ID Checker or all of the Applications if you logged in as a Manager

**DBS Tracking Service** by pressing this button, a new browser window is opened which takes you directly to the DBS enquiries page. Here you can enter the Application Form Reference (DBS Ref No) and the Applicant's date of birth to determine the state of play of an application submitted to the DBS with their processes.