

A woman with long hair and glasses is sitting at a desk, leaning forward and looking at a laptop. She has her hand resting on her chin, appearing thoughtful. The background is a blurred office environment. The entire image has a blue color cast. A large, light blue curved shape is on the left side, partially overlapping the text.

citb

Tool Kit

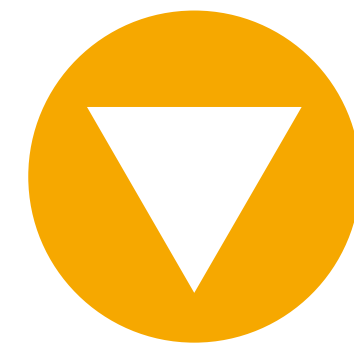
▶ Your New Online Portal

This is your '**tool kit**' comprising of Key Features, How to Guides, Video Tutorials, and FAQs, providing comprehensive support for the new portal.



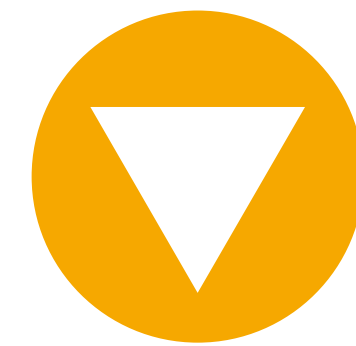
Portal recordings:

Clickable tutorial videos, including step-by-step instructions on how to operate the portal.



How to Guides:

Comprehensive guides demonstrating the portal functions and processes



FAQs:

A dedicated section where customers can find answers to their questions.

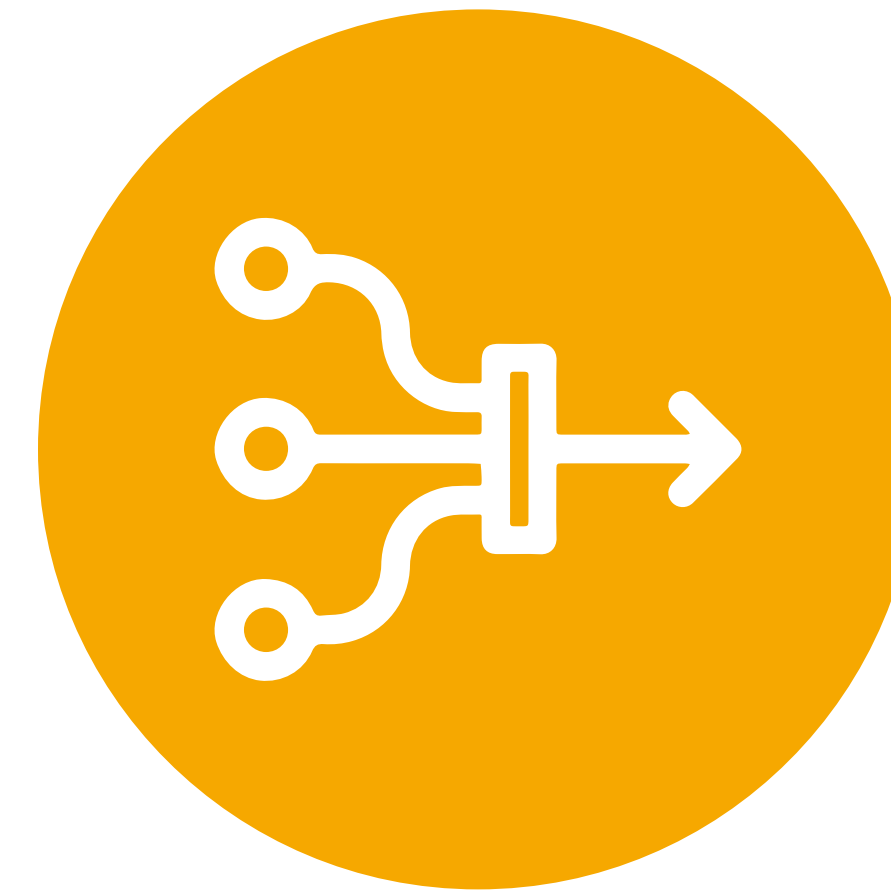


▶ Portal Key Features



Simplified Sign Up

Get started in minutes by signing up as a new user. Follow our easy step-by-step process and unlock a world of grant application possibilities.



Seamlessly Apply for Grants

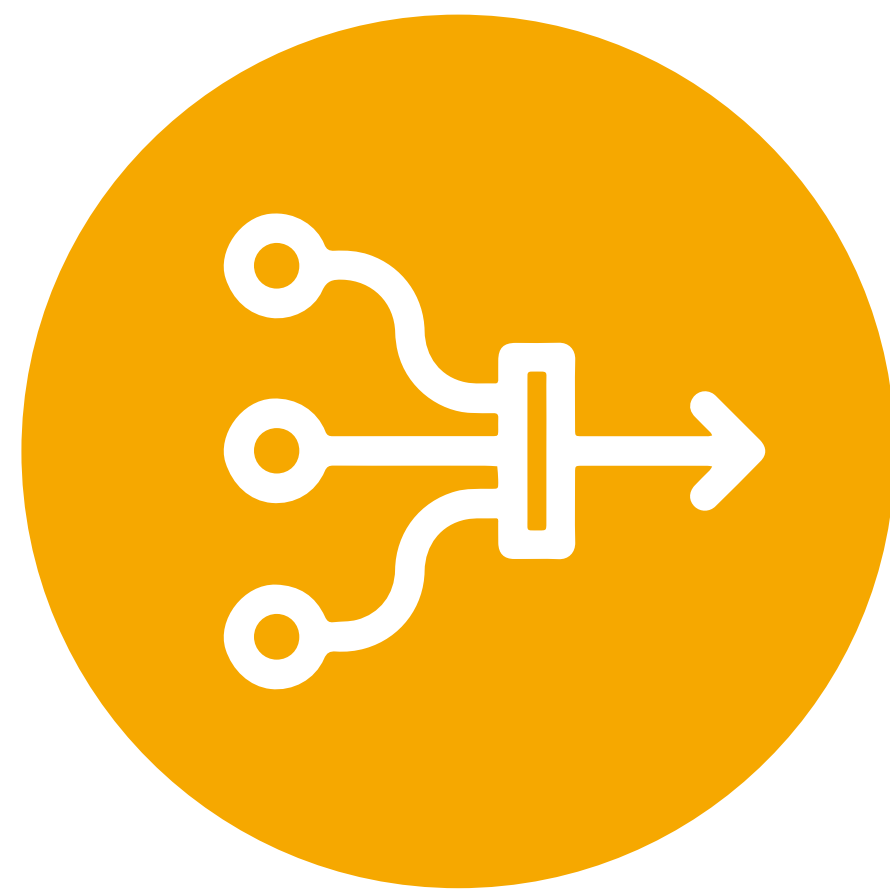
Choose between individual and bulk grant application forms. Benefit from in-built help and validation, and effortlessly upload the required evidence.



Manage Access and Control

Take full advantage of our access control feature to manage user permissions within your organisation. Stay in control and ensure your team has the right access levels.

▶ Portal Key Features



Streamlined Application Process

Experience a user-friendly interface with individual and bulk grant application forms. Enjoy built-in help and validation, ensuring accuracy and completeness. Upload evidence directly through the portal.



Save and Resume

No need to rush through applications. Our portal allows you to save partially completed bulk applications as drafts and return to them at a later date. Take your time without losing progress.



Automatic Access for Grant Online Users

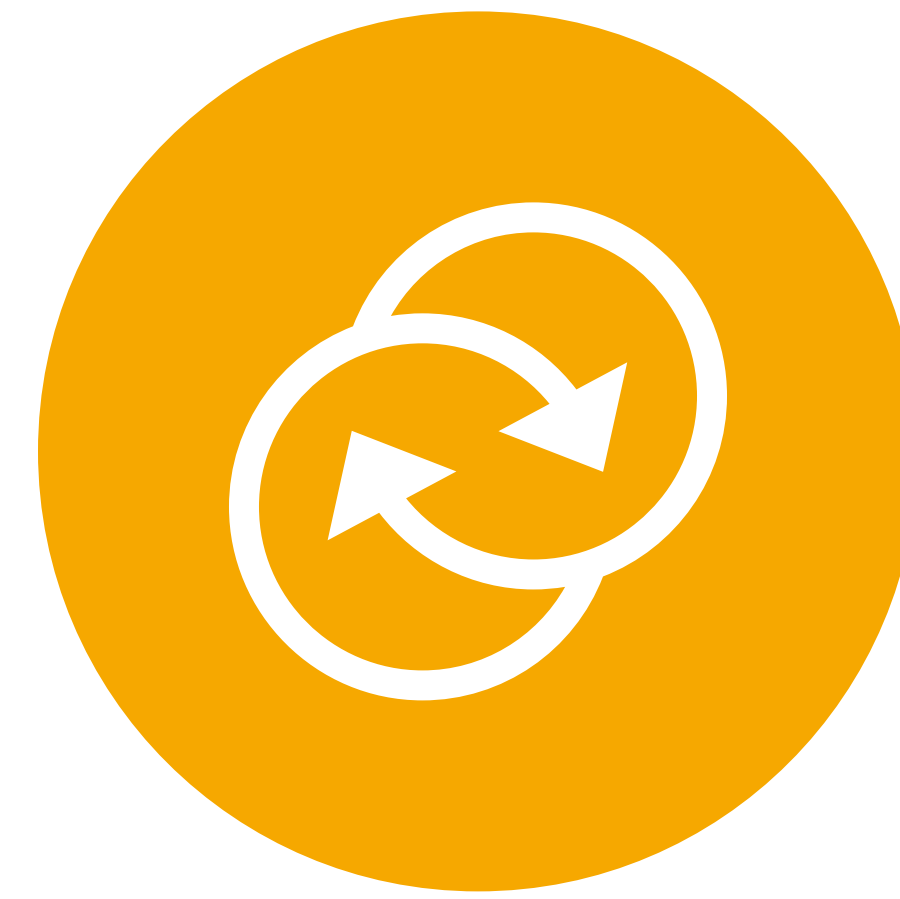
If you currently have Grant Online access, you're all set for our customer portal. Enjoy seamless transition and continue to access all the features you need in one place.

▶ Portal Key Features



User Management Made Easy

Take control of access to your employer within the portal. Add and remove users, and easily adjust their access levels. Manage your team's permissions with efficiency and precision.



Seamless Integration

Link the new portal with our existing Levy & Grant functions effortlessly. Utilise the same login details and enjoy a smooth and cohesive experience across all our platforms.

▶ Video Tutorials & How to guides



▶ Click here for the user guide



▶ Click here for the user guide



▶ Click here for the user guide



▶ Click here for the user guide



▶ Click here for the user guide



▶ Click here for the user guide

▶ Frequently Asked Questions

▶ How to create an online account?

You can sign up for a Levy and/or Grant Online account by completing the online registration form.

For more help, click on the Signing up to the portal user guide.

▶ How to reset my password?

In the portal, click 'Sign in' and then 'Forgot your password?', and follow the steps to send a verification code to your email address and reset your password.

▶ How to submit a grant application?

To apply for an individual application please follow the user guide.

▶ How to apply/submit a bulk application?

To apply for a bulk application please follow the user guide.

▶ How to remove an online user from my online account?

Only those who have 'Admin' permissions for their employer in the portal can remove user access. For more information please follow the user guide.

▶ How can I request access for multiple employers?

After logging in, you will be presented with the 'Request access to an employer' screen. Please follow the user guide for more information.

▶ How do I get access to Levy?

To request access to Levy Online, use the same 'Request access to an employer' process as for grant access, but select 'Levy' as your access option. These requests are sent to CITB's Customer Operations team, who will review and respond to grant your access.

▶ How do I get access to both Levy and Grant together?

Levy and Grant Online access must be requested separately. To access both, log into the portal, request access to one, and then submit a request for the other.

▶ As an admin, how do I approve Levy access requests, or manage Levy users at my employer?

The employer admin area allows you to manage access against the Grant Online functions in the new portal. Levy Online is managed through existing processes by our Customer Operations team. As we continue to develop the portal over time, you will be able to manage more accesses directly in the portal, including for Levy.



Thank you

