



Client Portal Guide



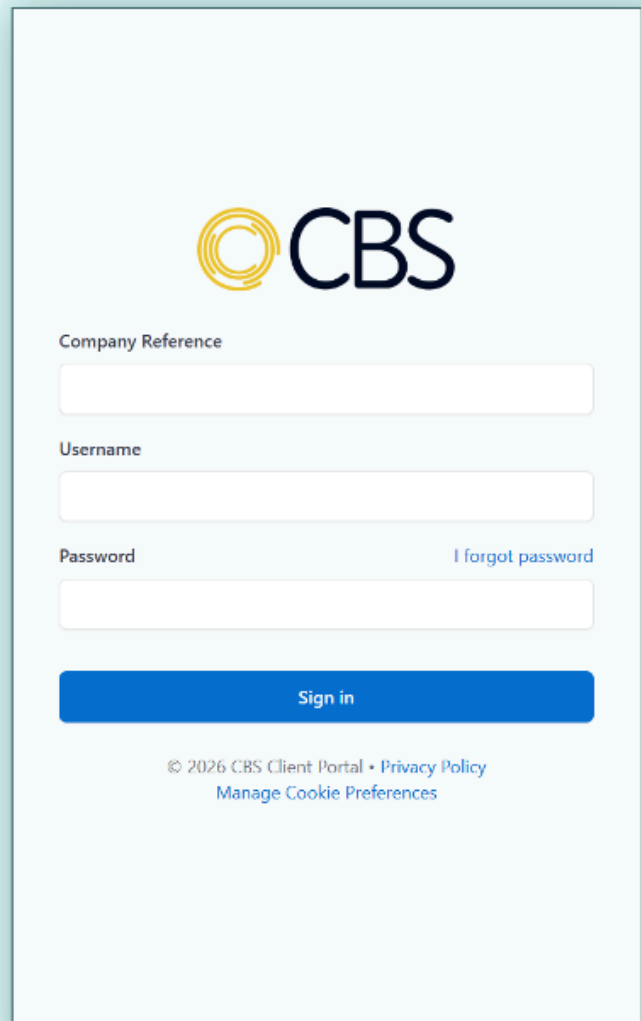
Client Portal Guide

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Logging into the Portal

Once CBS has set up your account, you will be provided with your Access Code, Login Details and a temporary password which you will need to reset when you first log in to the Client Portal. Navigate to the CBS Client Portal Login Page: client.cbscheck.com



The screenshot shows the CBS Client Portal login page. At the top center is the CBS logo, consisting of a yellow circular icon with a stylized 'C' and the letters 'CBS' in a bold, dark blue font. Below the logo are three input fields: 'Company Reference', 'Username', and 'Password'. The 'Password' field has a blue link 'I forgot password' to its right. Below the input fields is a blue 'Sign in' button. At the bottom of the page, there is a copyright notice: '© 2026 CBS Client Portal • Privacy Policy' and a link 'Manage Cookie Preferences'.



Logging into the Portal

Enter Your Credentials

You'll need three pieces of information to log in:

Company Reference

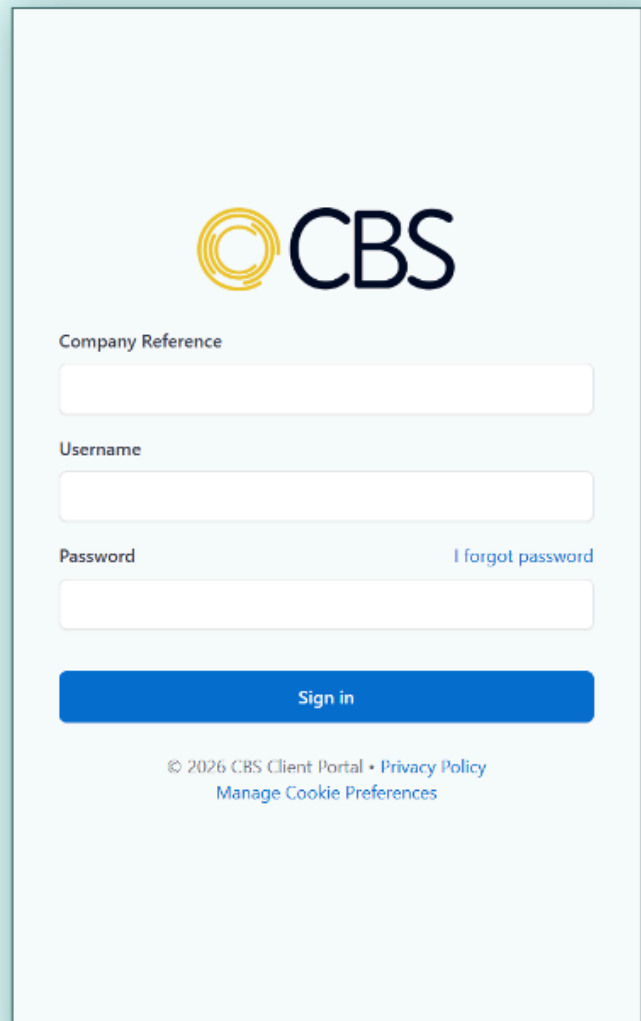
Your company reference number

Username

Your individual username

Password

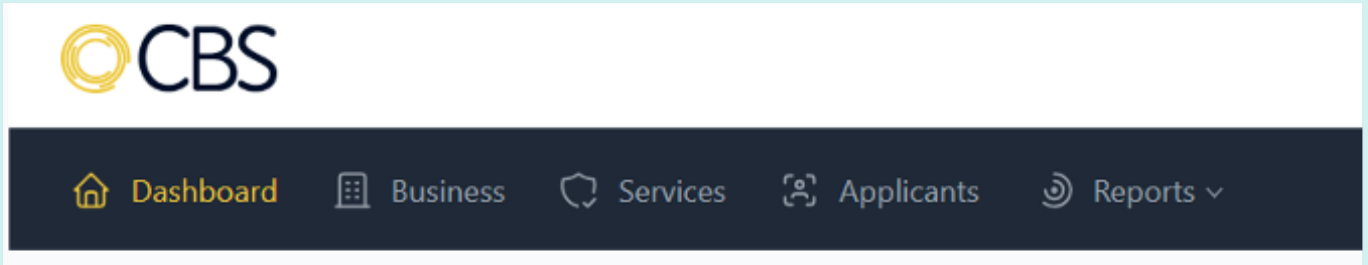
Your secure password
Enter each of these in the corresponding fields on the Login Page.



The screenshot shows the CBS Client Portal login interface. At the top center is the CBS logo, consisting of a yellow circular icon with a stylized 'C' and the letters 'CBS' in a bold, black, sans-serif font. Below the logo are three input fields: 'Company Reference', 'Username', and 'Password'. The 'Company Reference' field is a simple white box with a light gray border. The 'Username' field is a white box with a light gray border. The 'Password' field is a white box with a light gray border, and to its right is a blue link that says 'I forgot password'. Below the input fields is a prominent blue button with the text 'Sign in' in white. At the bottom of the page, there is a copyright notice: '© 2026 CBS Client Portal • Privacy Policy' and a link to 'Manage Cookie Preferences'.



The Portal



Once you are logged in to the portal, you will be presented with a navigation bar at the top of the page which you will be able to access:

Dashboard – Main overview

Business – Your organisation settings and information

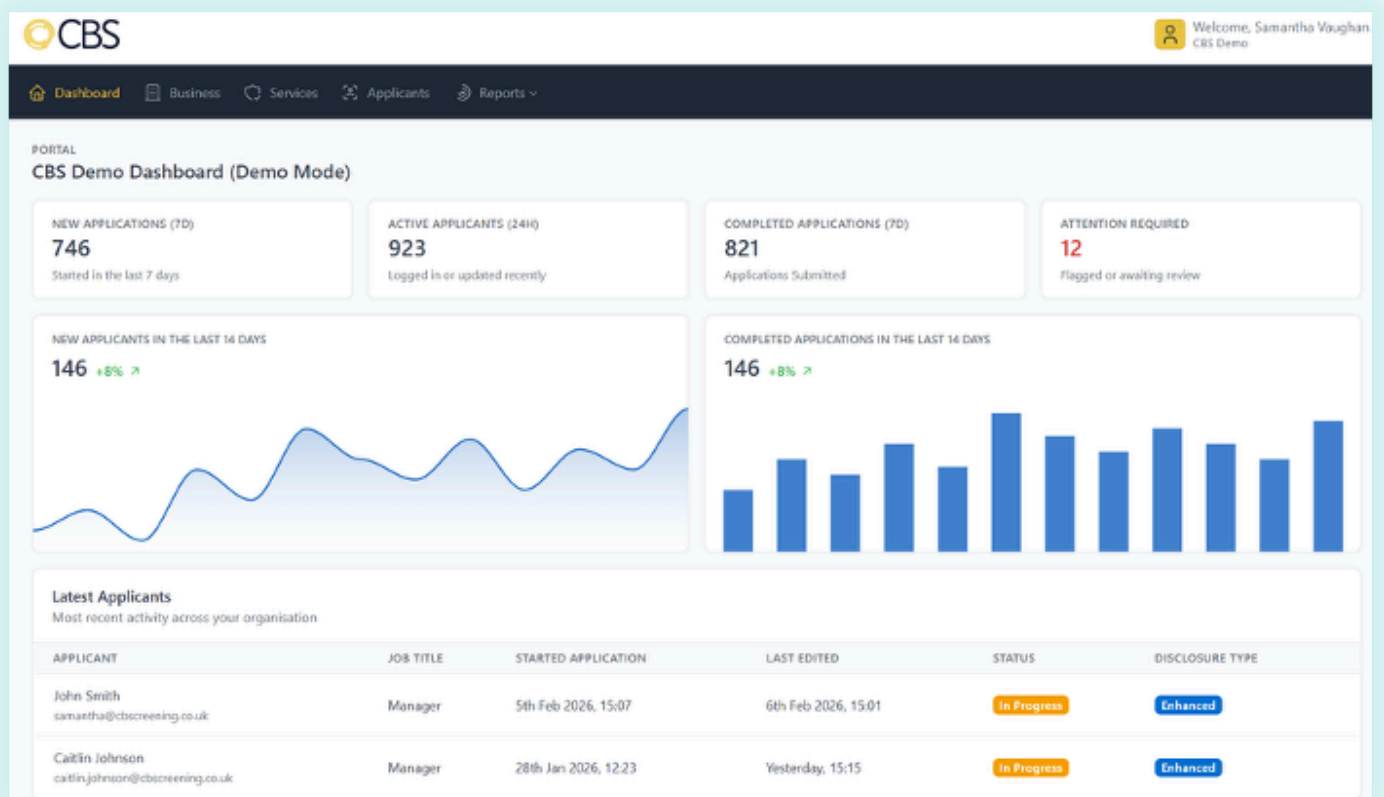
Services – Available packages assigned to your account

Applicants – Detailed applicant management

Reports – Generate and view reports



The Dashboard



The Dashboard

The dashboard will display the following:

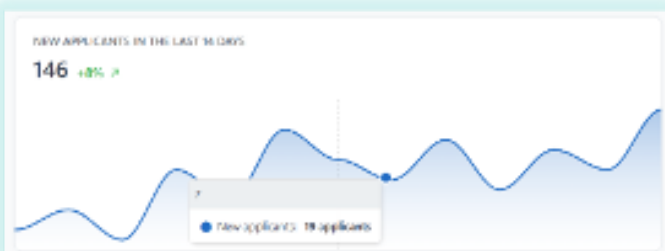
New applications within the last 7 days

NEW APPLICATIONS (7D)
746
Started in the last 7 days

Completed applications

COMPLETED APPLICATIONS (7D)
821
Applications Submitted

Graphical details of active applicants that have logged in recently



Active applicants that have logged in recently

ACTIVE APPLICANTS (24H)
923
Logged in or updated recently

Applications awaiting review

ATTENTION REQUIRED
12
Flagged or awaiting review

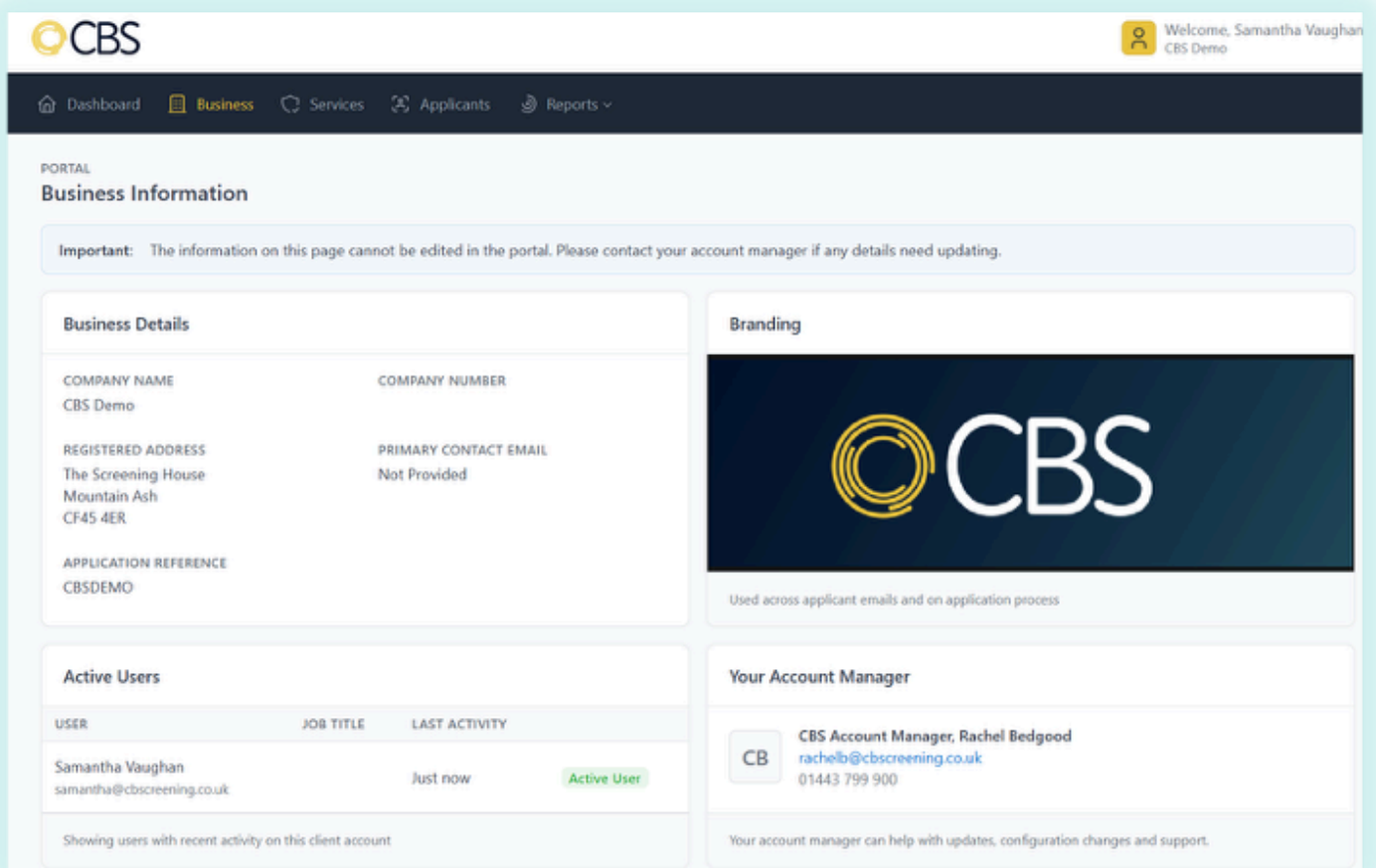
Details of the applications as well as the status

APPLICANT	JOB TITLE	STARTED APPLICATION	LAST EDITED	STATUS	DISCLOSURE TYPE
John Smith j.smith@cbsscreening.co.uk	Manager	18 Feb 2024, 15:07	18 Feb 2024, 15:07	In Progress	Enhanced
Colin Johnson c.johnson@cbsscreening.co.uk	Manager	08 Feb 2025, 12:23	Yesterday, 13:13	In Progress	Enhanced



The Business Page

This page provides information about your organisation, the branding displayed on applicant communications, your CBS contact, users, etc. For any changes you wish to make on this page, please contact your CBS representative and we will make the changes for you.



The screenshot shows the CBS Business Information page. At the top left is the CBS logo. At the top right, a user profile for Samantha Vaughan is shown with the text "Welcome, Samantha Vaughan" and "CBS Demo". Below the header is a navigation bar with links for Dashboard, Business, Services, Applicants, and Reports. The main content area is titled "PORTAL Business Information" and contains an important notice: "The information on this page cannot be edited in the portal. Please contact your account manager if any details need updating." The page is divided into four sections: Business Details, Branding, Active Users, and Your Account Manager. Business Details includes fields for Company Name (CBS Demo), Company Number, Registered Address (The Screening House, Mountain Ash, CF45 4ER), Primary Contact Email (Not Provided), and Application Reference (CBSDEMO). Branding shows the CBS logo and text "Used across applicant emails and on application process". Active Users is a table with columns for User, Job Title, and Last Activity, listing Samantha Vaughan as an Active User. Your Account Manager section identifies Rachel Bedgood as the CBS Account Manager, providing her contact information.

Important: The information on this page cannot be edited in the portal. Please contact your account manager if any details need updating.

Business Details

COMPANY NAME	COMPANY NUMBER
CBS Demo	
REGISTERED ADDRESS	PRIMARY CONTACT EMAIL
The Screening House Mountain Ash CF45 4ER	Not Provided
APPLICATION REFERENCE	
CBSDEMO	

Branding

Used across applicant emails and on application process

Active Users

USER	JOB TITLE	LAST ACTIVITY
Samantha Vaughan samantha@cbscreening.co.uk		Just now Active User

Showing users with recent activity on this client account

Your Account Manager

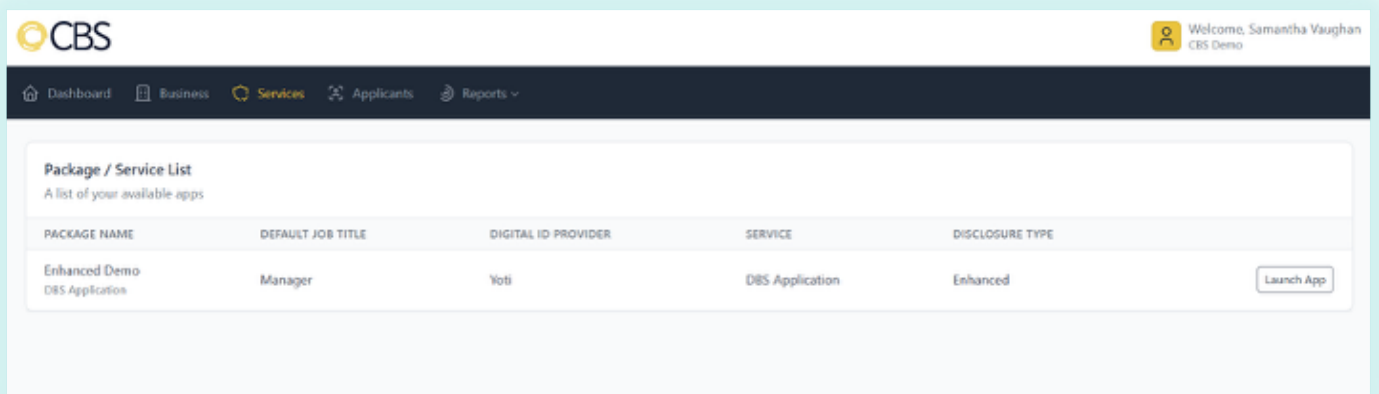
CB CBS Account Manager, Rachel Bedgood
rachelb@cbscreening.co.uk
01443 799 900

Your account manager can help with updates, configuration changes and support.



The Services Page

The services page gives you an overview of the packages assigned to your account, the roles assigned as well as the digital identity service provider where applicable.



The screenshot displays the CBS Services page. At the top left is the CBS logo. The top right shows a user profile for 'Samantha Vaughan' with the text 'Welcome, Samantha Vaughan' and 'CBS Demo'. Below the header is a navigation bar with links for 'Dashboard', 'Business', 'Services' (highlighted), 'Applicants', and 'Reports'. The main content area is titled 'Package / Service List' with the subtitle 'A list of your available apps'. It contains a table with the following data:


PACKAGE NAME	DEFAULT JOB TITLE	DIGITAL ID PROVIDER	SERVICE	DISCLOSURE TYPE	
Enhanced Demo DBS Application	Manager	Yoti	DBS Application	Enhanced	Launch App

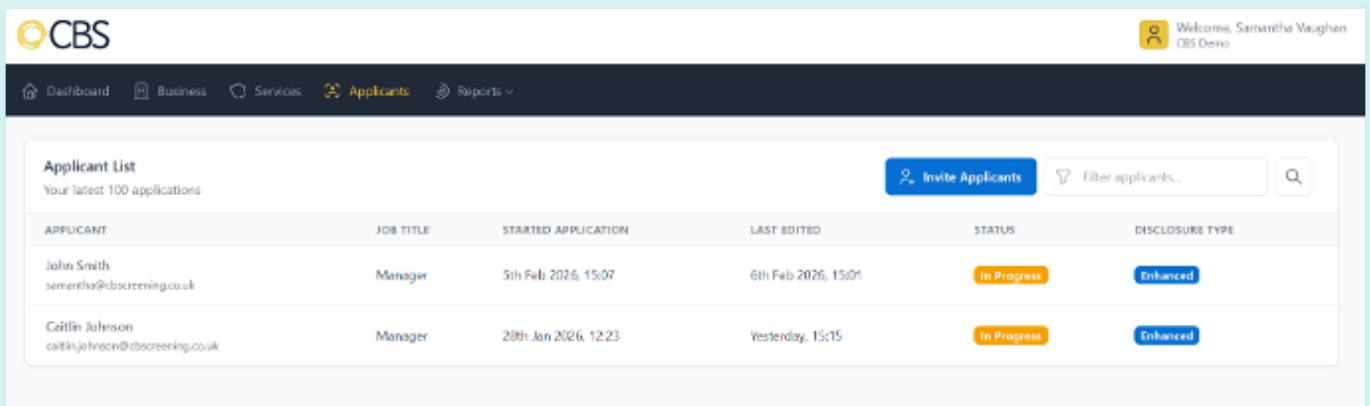


The Applicant Page

The Applicants page provides you with details of the recent applicants, when they started their application, when the last action was taken on the application and the status.

Here you can also search for an applicant to see this information.

In addition, you can also invite new applicants to complete their background screening application by clicking on the  button.



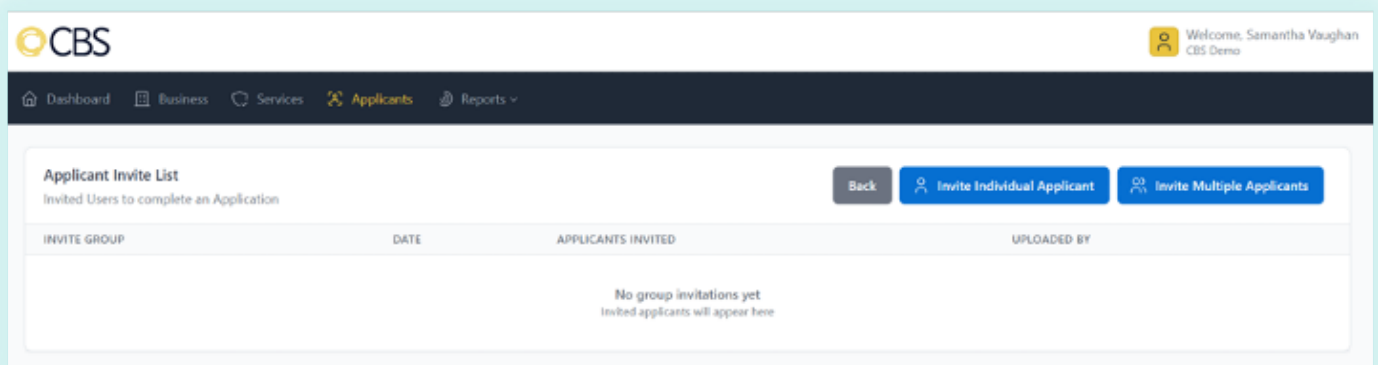
The screenshot shows the CBS Applicant List page. At the top left is the CBS logo. At the top right, it says "Welcome, Samantha Vaughan CBS Demo". Below the logo is a navigation bar with "Dashboard", "Business", "Services", "Applicants", and "Reports". The main content area is titled "Applicant List" and "Your latest 100 applications". It features a table with columns: "APPLICANT", "JOB TITLE", "STARTED APPLICATION", "LAST EDITED", "STATUS", and "DISCLOSURE TYPE". There are two rows of data. The first row is for John Smith, Manager, started on 5th Feb 2026, last edited on 6th Feb 2026, status is "In Progress", and disclosure type is "Enhanced". The second row is for Caitlin Johnson, Manager, started on 28th Jan 2026, last edited yesterday, status is "In Progress", and disclosure type is "Enhanced". Above the table is a search bar with "Filter applicants..." and a search icon. To the left of the search bar is a blue button labeled "Invite Applicants".

APPLICANT	JOB TITLE	STARTED APPLICATION	LAST EDITED	STATUS	DISCLOSURE TYPE
John Smith samertha@cbscreening.co.uk	Manager	5th Feb 2026, 15:07	6th Feb 2026, 15:01	In Progress	Enhanced
Caitlin Johnson caitlin.johnson@cbscreening.co.uk	Manager	28th Jan 2026, 12:23	Yesterday, 15:15	In Progress	Enhanced



Invite Applicant

You will have the option to invite individual applicants separately or send multiple email invitations automatically via a bulk upload.



Invite an individual

The 'Invite an Individual' form contains the following fields and options:

- Package (Service) ***: A dropdown menu with 'Enhanced Demo (Enhanced)' selected.
- Applicant Email ***: A text input field.
- Applicant First Name ***: A text input field.
- Applicant Last Name ***: A text input field.
- Custom message with invite**: A text area with a placeholder: 'In addition to the standard email, you can include a custom message'.
- Buttons: 'Cancel' and 'Invite Applicant'.

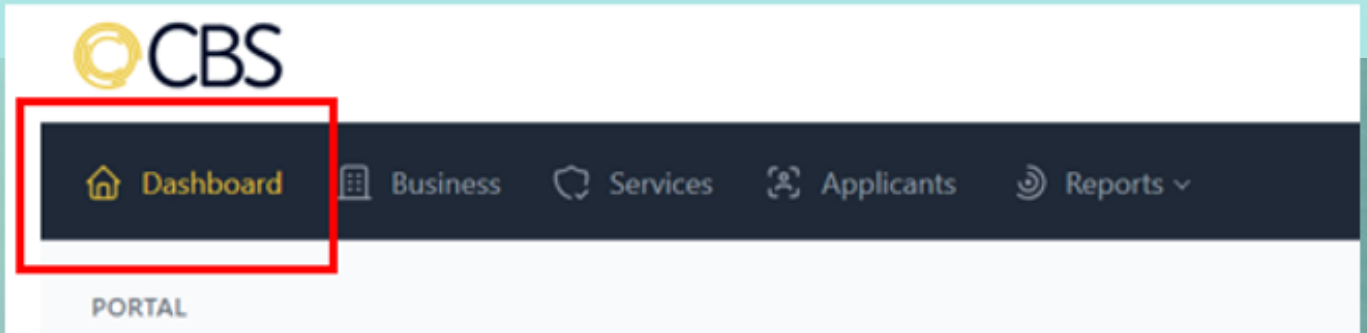
Invite multiple applicants

The 'Invite Multiple Applicants' form contains the following fields and options:

- Package (Service) ***: A dropdown menu with 'Enhanced Demo (Enhanced)' selected.
- Label Your Upload ***: A text input field with 'eg. February 2025 Candidates'.
- Custom message with invite**: A text area with a placeholder: 'In addition to the standard email, you can include a custom message'.
- Upload CSV file ***: A file upload button labeled 'Choose File' and a status indicator 'No file chosen'.
- Instructions**: A note stating 'Your needs to be [email, first_name, last_name] as 3 columns'.
- Buttons: 'Cancel' and 'Invite Applicants'.



Invite Applicant



- Once you submit the request, whether it is an individual application or a bulk upload, the candidate will receive an email with instructions to complete their background screening application.
- The email can be branded with your logo and be customisable for each package that you have on your account.
- Once the email has been sent, you will also be able to track the application on the “Dashboard” page.



Applicant Status

Applicant List
Your latest 100 applications

[Invite Applicants](#)

APPLICANT	JOB TITLE	STARTED APPLICATION	STATUS	DISCLOSURE TYPE	LAST UPDATED
Rachael Bedgood rachelb@cbscreening.co.uk	Driving Instructor	5 minutes ago	Awaiting Applicant	Enhanced	1 minute ago
Rachael Bedgood rachelb@cbscreening.co.uk	Driving Instructor		Invited	Enhanced	4 hours ago
Rachael Bedgood rachelb@cbscreening.co.uk	Driving Instructor		Invited	Enhanced	4 hours ago
Ashley Decloquement-davis ashley.decloquement.davis@cbscreening.co.uk	Driving Instructor		Invited	Enhanced	5 hours ago
Rachael Bedgood rachelb@cbscreening.com	Driving Instructor	4 hours ago	Awaiting Applicant	Enhanced	3 hours ago
Rachael Bedgood rachelb@cbscreening.co.uk	Driving Instructor		Invited	Enhanced	5 hours ago
Rachel Bedgood rachelb@cbscreening.com	Driving Instructor	4 hours ago	Awaiting Applicant	Enhanced	4 hours ago
Live Test dev@cbscheck.com	Driving Instructor	Yesterday, 21:50	Completed	Enhanced	4 hours ago



Applicant Status

Invited

- The applicant has been sent an invitation but has not started the application

Awaiting Applicant

- The applicant has started the application but has not submitted it yet

Awaiting Results

- The application has been submitted to the DBS, and the E-reference number is displayed for tracking purposes

Complete Review

- The application is complete and the result needs review

Completed Clear

- The application is complete and the result is clear.



Applicant Status

Clicking on each applicant will provide further details of the applicant and status, some examples below.

Useful Information

APPLICATION STARTED
11th Feb 2026, 21:50

USER IP
100.77.130.3

APP VERSION
2.0.4

DISCLOSURE TYPE
Enhanced

Current Personal Information

Full name
MR LIVE TEST

Date of birth
1st January 1988 (38 years old)

Gender
Male

Telephone
+447787123456

Applicant's details as well as details of when they started the application process

Application Status Information

Last update, Yesterday, 10:47

APPLICATION STATUS
Completed

ID VERIFIED
Yes, Post Office Ltd, IBV

DBS STATUS
Sent

DBS RESULT
Clear

Further details on the identity verification and the status of the DBS check

Application Status Information

Last update, Yesterday, 17:02

APPLICATION STATUS
Awaiting Applicant

ID VERIFIED
No **IBV Started**

DBS STATUS
Not Sent

DBS RESULT
Not Sent

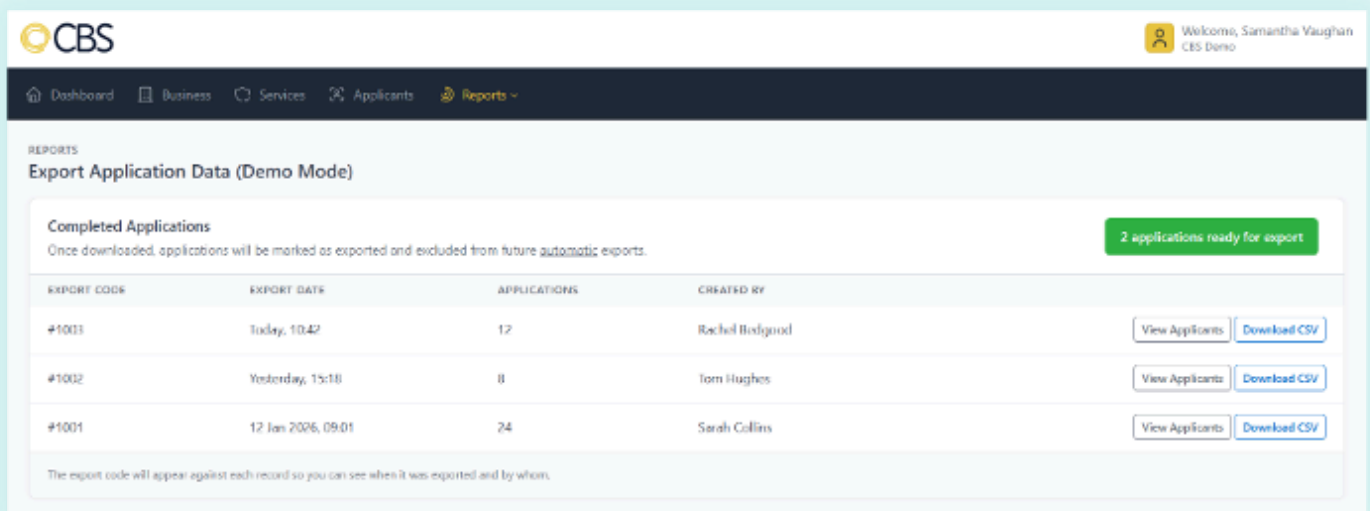


The Reports Page

The reports page allows you to download reports that provide the following information:

- Applicant personal details
- When the application started
- Application Status
- Completion date

The reports page also tells you how many completed applications have not been downloaded and exported yet.



The screenshot shows the CBS Reports page. At the top left is the CBS logo. At the top right, it says 'Welcome, Samantha Vaughan CBS Demo'. Below the navigation bar, the page title is 'REPORTS Export Application Data (Demo Mode)'. A green notification box says '2 applications ready for export'. Below this is a table with columns: EXPORT CODE, EXPORT DATE, APPLICATIONS, and CREATED BY. There are three rows of data. Each row has 'View Applicants' and 'Download CSV' buttons. A note at the bottom states: 'The export code will appear against each record so you can see when it was exported and by whom.'

EXPORT CODE	EXPORT DATE	APPLICATIONS	CREATED BY
#1001	Today, 10:42	12	Rachel Redwood
#1002	Yesterday, 15:18	8	Tom Hughes
#1001	12 Jan 2026, 09:01	24	Sarah Collins





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