

# Third Party Digital Achievement Portal Guidance Document

## About the Third-Party Portal

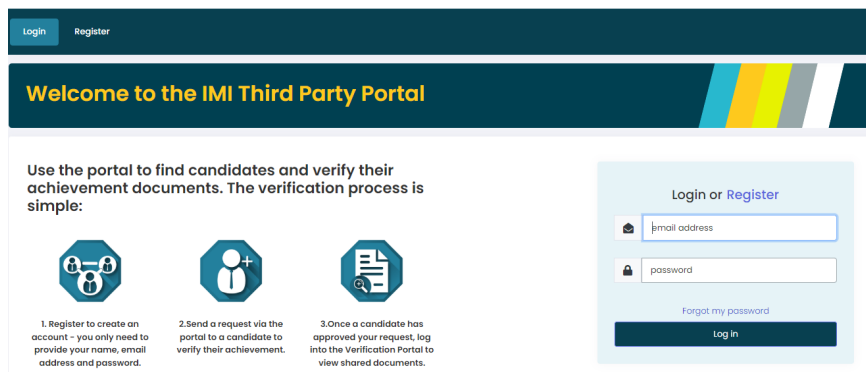
The Third-Party Portal is where you can view, or request to view, achievement documents that have been shared with you by a learner. The Third-Party Portal can be accessed on any device, PC, laptop, tablet and mobile phone.

There is no charge for using the Third-Party Portal to view documents.

## Accessing the Third-Party Portal

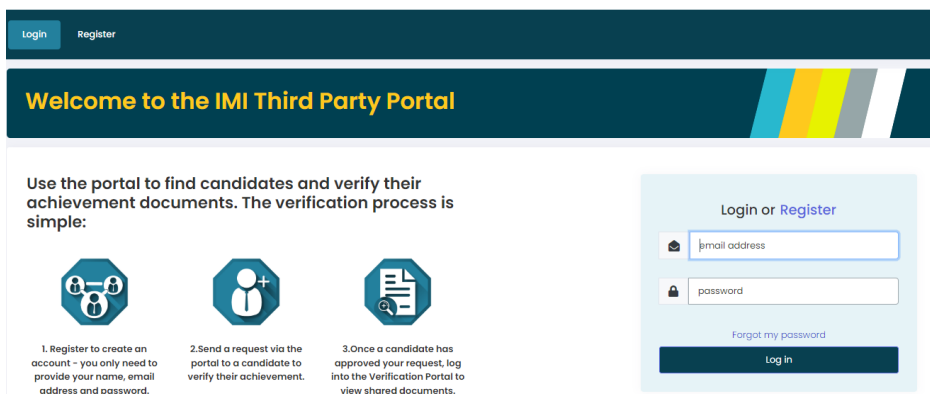
To access the Third-Party Portal for the first time, you need to register.

1. Click on the "Register" button, then complete the requested registration details. When you have completed the registration process, you will receive an email with a verification link. Click the link to verify your account.



**If you do not receive your email**, please check your email spam and/or junk folders as your email provider may not have recognised the sender as a safe sender and re-directed it from your inbox. If after checking your spam and junk folders you still have not received your confirmation email, please contact us at [cas@theimi.org.uk](mailto:cas@theimi.org.uk) providing your name, date of birth and email address.

2. Once you have registered and created an account, you can log in using your username and password. Note: you will need to register to use the portal before you can log in

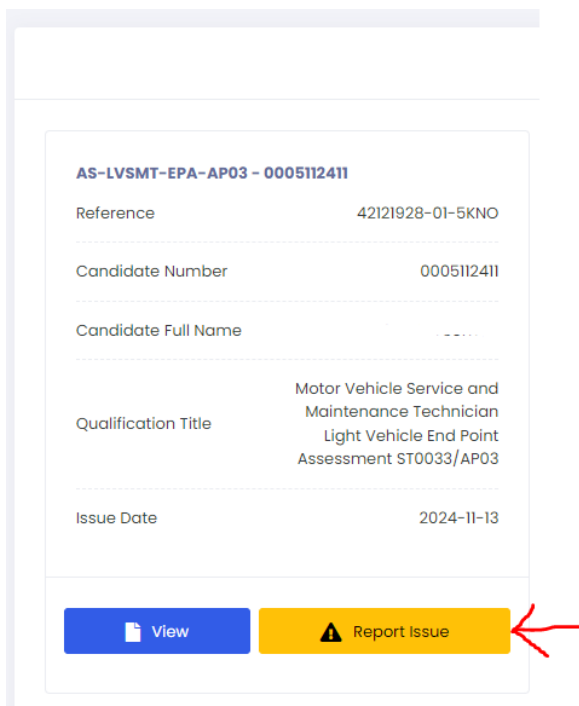


Documents and Connections

The digital documents issued on the Third-Party Portal are official documents of the IMI and are equally as valid as printed documents.

The Third-Party Portal allows you to access and view a digital version of the document. By design, these digital documents are not intended to be downloaded or printed, and if printed or downloaded are not valid.

**If you think something on the document is incorrect** then use the Report function (yellow button) in the view documents section of the Third-Party Portal and describe the problem. This will send a message to the team and can be checked for you.

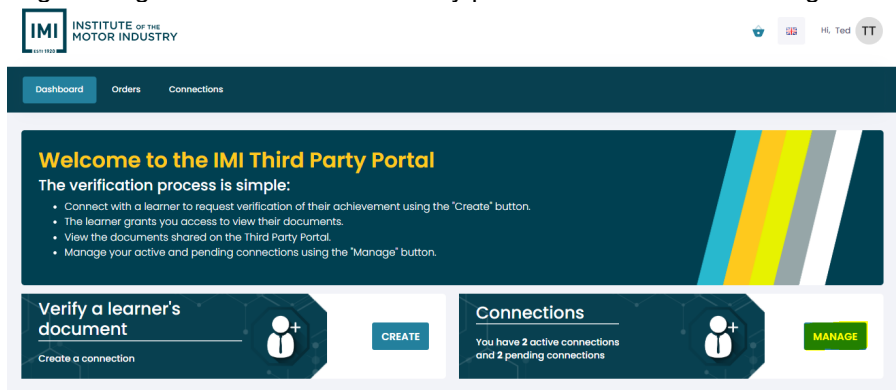


All digital documents are available on the portal for as long as the learner has approved to give you access. This access can be withdrawn at any time by the learner.

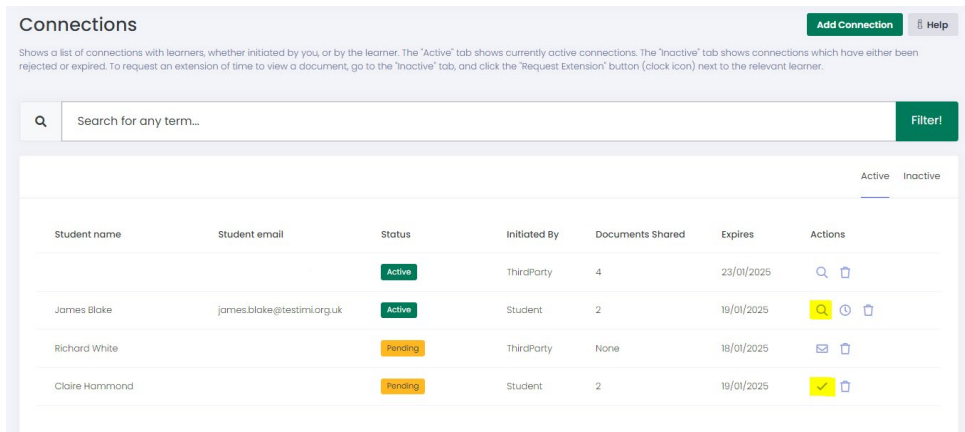
**The connections process works in the following way:**

**If a learner makes a connection request with you, you will receive an email to notify you.**

1. Login or register to use the Third-Party portal and click on the manage button next to the connection

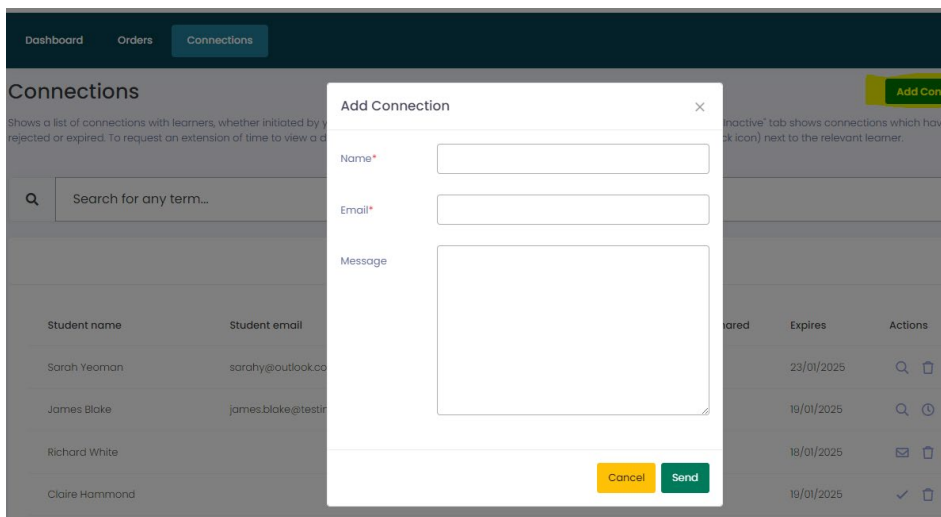


- A list of your connections will appear. If you wish to accept the connection request, click the tick icon under the actions section. The learner will then receive an email to notify them you have accepted their connection. You can then view any documents they have shared with you by clicking on the view icon under the actions section in the connections area.



**Alternatively, you can make a connection with a learner**, requesting them to share documents with you.

- Click the "Add Connection" button, enter the details of the email address of the learner with whom you wish to connect, and this will send an email to the learner to request them to share documents with you. The learner can then accept the connection request, enabling you to view their documents, and you will receive an email when they have done so.

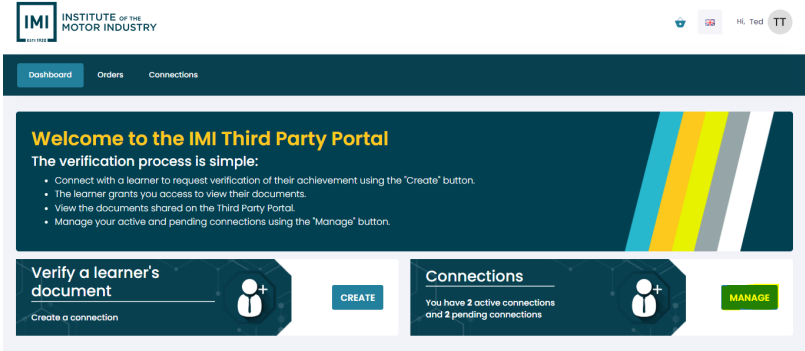


You will be able to see any documents that the learner has shared with you up until the access expiry date set by the learner.

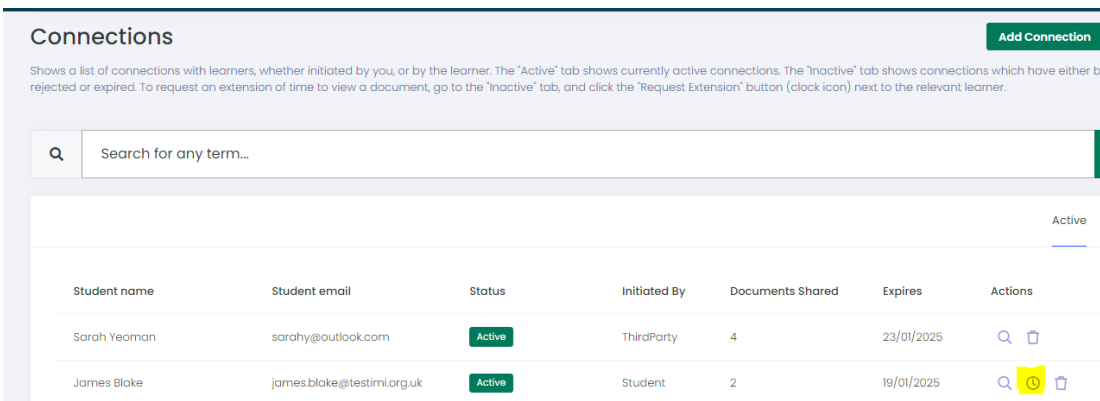
**If you are not able to see the documents you want for a particular learner**, the learner you wish to view documents for must give you access to view their documents. Please contact them directly to make this request or to clarify what documents they have given you access to. When a learner gives you access, this is for a limited period of time set by them. This permission therefore could have expired. Again, please contact them to clarify your access.

**If you wish to extend a connection date with a learner:**

1. From your dashboard select the connections option and manage connections.

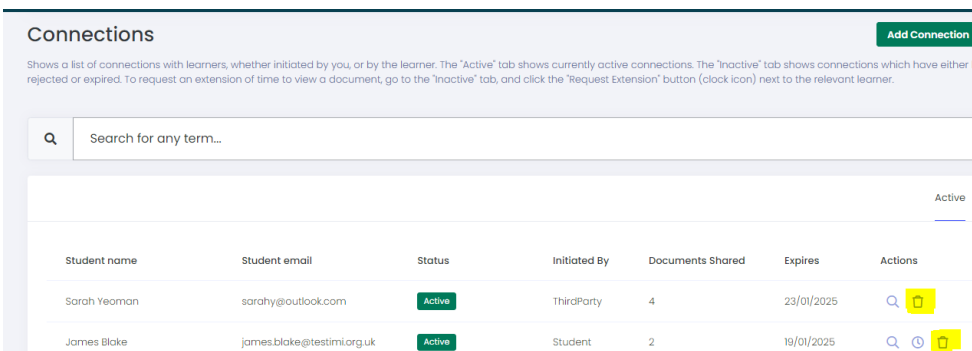


2. Use the extend option under the actions section to request an extension to the expiry date you have for a learner. The learner will receive an email to notify them that you have requested an extension to your connection. They will need to approve this request for the extension to be granted.



**If a learner extends a connection with you**, you will receive an email to notify you of this. When you log in and view you connection you will be able to see the new expiry date for the connection. The learner will then receive notification on if their request has been accepted or declined.

**If you wish to cancel a connection with a learner**, from your dashboard select the connections option and manage connections. To cancel the connection, click on the cancel button (waste bin symbol under actions). The learner will then receive notification that their connection with you has been cancelled.



The Smart Verify Plus (QR) Code



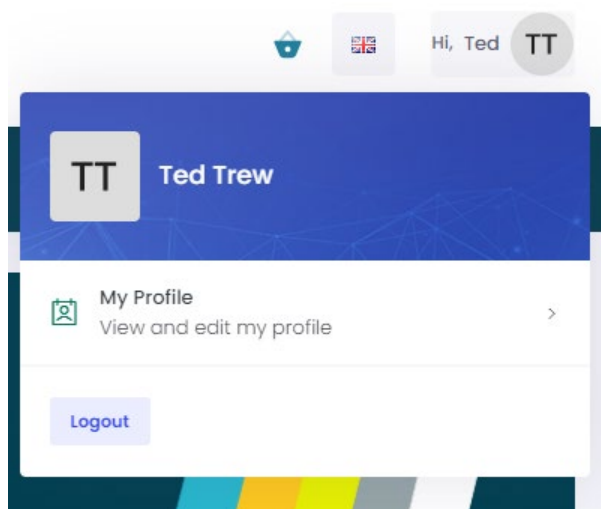
The Smart Verify Plus (QR) Code located on all printed and duplicate certificates, provides real-time information about the status of the document. Scan this code using the camera on a smartphone or tablet and the Smart Verify Plus portal will launch. This will show the status of the document, confirm key information about the document and (if enabled) display the digital document itself. This can be used for verification of physical documents and is a powerful way to verify the documents that have been shared with you.

Registration and User Account

**During registration, if you cannot select your date of birth easily**, the date of birth section does not allow users to manually type in their date of birth. To select your date of birth easily, without so many clicks, please click on the month to change the view to year and then decade. You will then be able to navigate to your year of birth more easily. If you cannot manage this, please set it to the correct date in the current year and then email [cas@theimi.org.uk](mailto:cas@theimi.org.uk) with your full name and date of birth.


**If you wish to delete your account**, please email us at [cas@theimi.org.uk](mailto:cas@theimi.org.uk) and we will delete your account

**If you wish to update your personal details**, click the "Manage" button under the profile section and update the details you require, saving them once complete. If you choose to add an address to your profile, this can be used as a billing address and/or delivery address when ordering printed copies of documents.



**Profile**

Use this page to edit your account details. If there are any issues with your information (such as your enrolment number) please feel free to contact us at [help@qualcert.co.uk](mailto:help@qualcert.co.uk)



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**Personal Details**

Additional Contact Information

Addresses

Change Password

**Personal Details**

First Name\*

Middle name

Last Name\*

User name\*

Phone number

Email address\*

Company Name

Job Title

**If you wish to update your password, click the "Manage" button under the profile section and the change password option. Update your password as required and click the save button.**

**If you have forgotten your password, click on the "forgot my password" link on the log in page and follow the steps to reset your password.**

### Support

**If you need help using the Third-Party Portal - Please email [cas@theimi.org.uk](mailto:cas@theimi.org.uk) who will be able to help you.**