

Certification Online Portal Roles

Examiner May take and track trainings but not apply for certification. Default role assigned to all users. Examiners may submit their own attendance records if the toggle on their profile is turned on (this can be done by agency POC).

Applicant May apply for certification, take and track trainings. Typically assigned when an examiner is ready to pursue certification and has met basic eligibility requirements.

Level 1 Reviewer Provides first level review for certification applications from Applicants who are typically direct reports. Responsible for providing ratings on competency categories and attesting to the applicant's narrative attestation in support of their certification.

Level 2 Reviewer Provides additional review for certification applications, per your agency's set number of levels of review*. An individual must be granted the level 2 reviewer role by the agency POC to review applications at level 2.

Level 3 Reviewer Provides additional review for certification applications, per your agency's set number of levels of review*. An individual must be granted the level 3 reviewer role by the agency POC to review applications at level 3.

Level 4 Reviewer Provides additional review for certification applications, per your agency's set number of levels of review*. An individual must be granted the level 4 reviewer role by the agency POC to review applications at level 4.

Level 5 Reviewer Provides additional review for certification applications, per your agency's set number of levels of review*. An individual must be granted the level 5 reviewer role by the agency POC to review applications at level 5.

State Training Director Manages an agency's attendance reporting. Can submit new courses to the system and add course offering dates to existing courses. Can approve courses and offerings submitted by examiners with the ability to log their own attendance toggled on. Can view reporting such as active certifications, course attendance/transcripts, and the Expiring Certifications dashboard. Has extensive insight into the application review process. Can view applications in progress dashboard, controls application workflow, and can reassign application review to other users. Often serves as liaison between CSBS and the agency for certification-related communications.

POC: Manages the Agency in the Certification portal. Can set up number of levels of review, titles, regions/divisions, enable application routing by region/division and add additional POCs. Responsible for managing users in the portal including adding and removing users and updating user profiles including updating user's level 1 reviewer, hire date, or user roles. Can turn on toggle to allow examiners to enter their own training. Can view reporting such as applications in progress dashboard, active certifications, and course attendance/transcripts.

*Number of review levels at an agency is determined by the agency POC. The minimum is 1 and the maximum is 5 levels of review.