



Hier begint vertrouwen

# Certification Manual MijnDSI Employer Portal

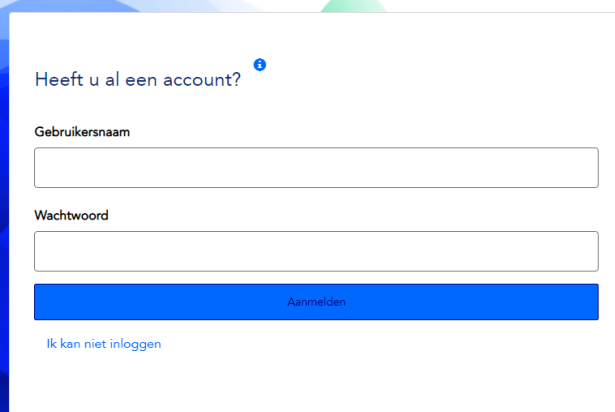
May 2022 | v 1.1

# Log in to MijnDSI

You can use the login details provided to log in via [mijn.dsi.nl](https://mijn.dsi.nl). Remember to enter your user name exactly as shown, including punctuation, characters and/or spaces. If you enter an incorrect password too often, your account will be blocked temporarily. To reactivate your account, contact DSI via 020-620 1274 (option 2 in the menu).

## Changing your password

If you cannot remember your password or it doesn't work for some reason, you can click on the link 'I can't log in' and enter your e-mail address. You will receive an e-mail explaining how to create a new password.



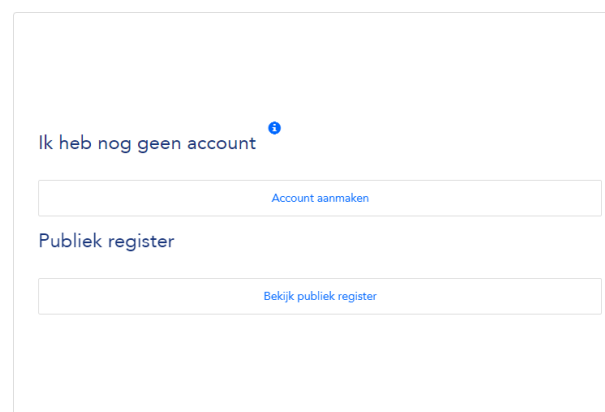
Heeft u al een account? <sup>i</sup>

Gebruikersnaam

Wachtwoord

Aanmelden

[Ik kan niet inloggen](#)



Ik heb nog geen account <sup>i</sup>

[Account aanmaken](#)

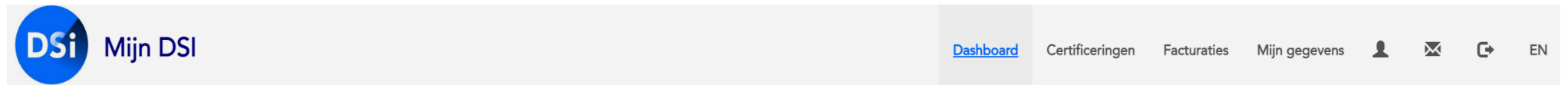
Publiek register

[Bekijk publiek register](#)

Bent u werkgever en wilt u een account aanmaken, neemt u dan contact op met DSI

# DSI Employer Portal




The MijnDSI environment for employers offers you a variety of options as a contact person. The employer portal uses the following menu structure:



- Dashboard
- Certification
- Invoices
- My details

Clicking on one of the menu options takes you to the underlying tab headings.

You can see three icons on the right::

-  Account details
-  Chat function (n/a: expected update 2022)
-  Log out

# Dashboard

When you log in, the first screen you see is the dashboard. You can use the dashboard to manage all of the certification requests linked to your organisation. Here you can search and filter results and send your professionals an invitation to submit a Certification request.

A **Screening** is a standard part of the registration procedure for a Certification request.

The screenshot shows the 'Mijn DSI' dashboard. At the top, there's a navigation bar with links: Dashboard, Certificeringen, Facturaties, Mijn gegevens, and a user profile icon. Below this, a row of seven status cards displays the number of requests in each state: Nieuw (0), Onvolledig (0), Ingediend (0), In behandeling (0), Niet volledig (0), Tweede beoordeling (0), and Goedgekeurd (1). The 'Goedgekeurd' card is highlighted in dark blue. Below the cards, a section titled 'Certificering aanvragen' includes a pagination control showing '1 van 1 pagina(s)' and 'Items per pagina (totaal: 2)'. A search bar labeled 'Zoeken en uitnodigen' contains several input fields: Kenmerk, Achternaam, Emailadres, Geboortedatum (with a date picker icon), and Aanvraagnr. Below these are fields for Startdatum, Organisatie (with a dropdown menu), Status (with a dropdown menu), and Register (with a dropdown menu). A green button labeled 'Uitnodiging versturen' is located at the bottom right of the search section.

DSi Mijn DSI

Dashboard Certificeringen Facturaties Mijn gegevens

Nieuw 0 Onvolledig 0 Ingediend 0 In behandeling 0 Niet volledig 0 Tweede beoordeling 0 Goedgekeurd 1

Certificering aanvragen

1 van 1 pagina(s) 10 Items per pagina (totaal: 2)

Zoeken en uitnodigen

Kenmerk Achternaam Emailadres Geboortedatum Aanvraagnr.

Startdatum Organisatie Status Register

dd-mm-yyyy Relatiebeheer DSI Status Register

Uitnodiging versturen

## Dashboard | Certification request status

At the top of the dashboard you can see the number of requests and their current status.

- New: the applicant has been invited and a Certification request has been created.
- Not yet submitted: the request is not yet complete and has not been submitted.
- Submitted: the request has been submitted to DSI and is ready for processing.
- Processing: the request is being processed by DSI.
- Incomplete: the request submitted to DSI is not complete, and has been returned to the applicant for more information (the applicant will be notified).
- 2nd assessment: the request will be checked for a second time in accordance with the '4 eyes principle'.
- Approved: the screening report has been issued and sent to the applicant. The Certification request has been approved, and the applicant is a (Candidate) Certified Professional listed in one of the relevant DSI registers.

Double-clicking on an employer shows you which phase the request is currently in.

# Dashboard | Search & Invite

Here you can search the list of Certification requests for your employees. You can also send an invitation for your employees to request a Certification.

You can use the various entry filters to select the organisation and specific employees. You can also select requests based on their status and register.

1

van 1 pagina(s)

10

Items per pagina (totaal: 2)

Zoeken en uitnodigen

Kenmerk

Achternaam

Emailadres

Geboortedatum

dd-mm-yyyy

Aanvraagnr.

Startdatum

dd-mm-yyyy

Organisatie

Relatiebeheer DSI

Status

Status ▾

Register

Register ▾

Uitnodiging versturen

Achternaam	Initialen	Type aanvraag	Startdatum	Register	Status
Smit	J.	Certificering	26-04-2022	DSI Informeren Beleggen Retail	Goedgekeurd
Test	N	Deelnemers pakket		DSI Adviseren Beleggen Standaard Retail	Gearchiveerd

## Dashboard | View request details

Double-clicking on an employer and an open request in the dashboard shows you which phase the request is currently in. Here you can also change the reference, report that the employee has left the company or send an invitation.

[← Terug](#)

Initialen

Achtern...

Geboort...

Kenmerk

Registrat...


Kenmerk wijzigen


Uit dienst melden


Uitnodiging versturen


Lopende aanvraag: 57983845202400637

gestart op: 27-10-2020

Uitgenodigd

Gestart

In behandeling

Verwerkt

Alle Aanvragen van

## Dashboard | Invite employees

You can use the portal to invite individual employees or groups of employees to request a Certification. You can also add a unique reference, such as an employee number and/or cost post.

### **If you do not wish to use the invitation tool**

Your employees also have the option of requesting a Certification without an invitation. Please note that they can only request a standard Certification via [mijn.dsi.nl](https://mijn.dsi.nl).

In this case, the employee is not immediately linked to you as an employer when they start the request. The employee can select their employer early in the request process. Naturally, they can only select employers who are also DSI participants. The request will appear in the portal once the applicant has selected the employer.



# Dashboard | Invite employees

Click on the 'Send invitation' button to go to the invitation field. You can do this in one of the following ways:

- Invite employees using individual e-mail addresses
- Invite employees by importing an Excel file

[Certificering aanvragen](#)

« 1 van 1 pagina(s) » 10 Items per pagina (totaal: 2)

**Zoeken en uitnodigen**

<b>Kenmerk</b>	<b>Achternaam</b>	<b>Emailadres</b>	<b>Geboortedatum</b>	<b>Aanvraagnr.</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="dd-mm-yyyy"/>	<input type="text"/>
<b>Startdatum</b>	<b>Organisatie</b>	<b>Status</b>	<b>Register</b>	
<input type="text" value="dd-mm-yyyy"/>	<input type="text" value="Relatiebeheer DSI"/>	<input type="text" value="Status"/>	<input type="text" value="Register"/>	

**Uitnodiging versturen**

# Inviting employees by e-mail address

You can add your employees' individual e-mail addresses here and send them invitations one at a time.

Select the option 'Based on e-mail addresses' and add the organisation.

Then click on 'Add an e-mail address'.

Uitnodiging(en) versturen

☒ Op basis van E-mailadressen

☐ Via een Excel import

Uitnodiging vanuit organisatie:

+ een e-mailadres toevoegen

# Inviting employees by e-mail address

Fill in the empty fields. The fields for e-mail address, last name and *Participants package* are all required fields.

Click on '**Next**' to send the employees invitations.

Uitnodiging(en) versturen

☒ Op basis van E-mailadressen

☐ Via een Excel import

Uitnodiging vanuit organisatie:

+ een e-mailadres toevoegen

Ontvangers:

E-mailadres	Achternaam	Voorletters	Geboortedatum	Kenmerk	Deelnemers pakket	
			dd-mm-yyyy			

Volgende

Annuleren

## Inviting employees by e-mail address

## Certification invitation e-mail

The invitation e-mail consists of a standard text that you can customize to suit your organization's needs. But please do not try to overwrite the links. The links in the template lead the employee correct request type.

Click on the 'Send' button to send the e-mails to the employees you imported using Excel or added manually. At this point, you will have the option of sending the invitation mail in Dutch or English.

Uitnodiging Bewerken

Normal | B | I | U | S | A | [Image] | [Link Icon] | [List Icon] | [List Icon] | [Text Color Icon] | [Text Color Icon]

Geachte heer/mevrouw {FullName%},  
  
U heeft een uitnodiging ontvangen voor een certificering.  
Klik [hier](#) om naar uw certificering in my DSI te gaan.  
  
Werkt de link niet goed? Plak dan de volgende link in uw browser:  
{link%}  
  
Met vriendelijke groet,

Selecteer een taal

nl\_NL

Vorige

Versturen

# Inviting employees using an Excel file

You can use this function to import an entire group of employees to send invitations.

Select the option 'Via an Excel import', then click on 'Download sample template'.

You can also select the organisation and package here.

Uitnodiging(en) versturen

☐ Op basis van E-mailadressen

☒ Via een Excel import

Uitnodiging vanuit organisatie:

U wilt uw medewerkers laten screenen/Certificeren.

U kunt hier uw medewerkers middels een Excelbestand uploaden in het systeem van DSI.

De medewerkers zijn dan al bij DSI bekend. U kunt hier het Excelbestand voor de upload downloaden.

Om het Excelbestand te vullen heeft u de volgende gegevens nodig: download een voorbeeld template via onderstaande button.

Let op dat de datum ingevoerd wordt op de volgende manier: dd-mm-jjjj

Voorbeeld template downloaden

...

Bladeren...

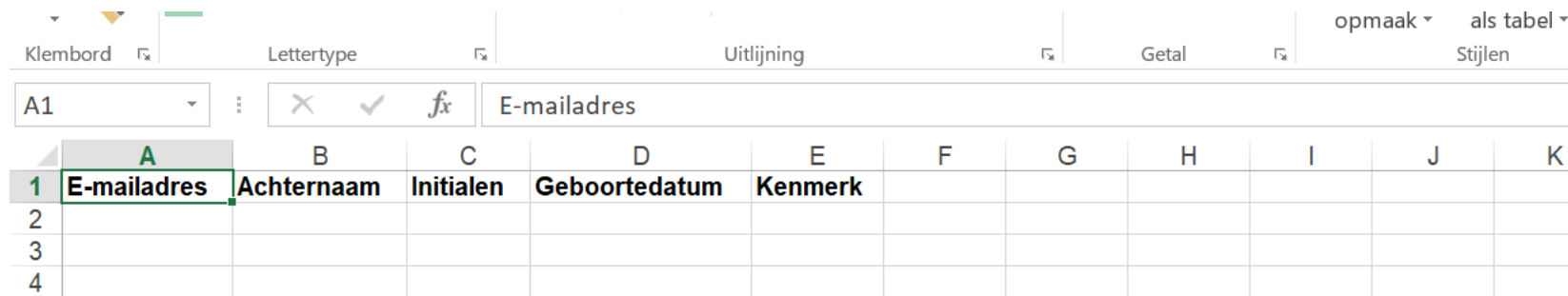
Selecteer een pakket

Importeer bestand

13

# Inviting employees using an Excel file

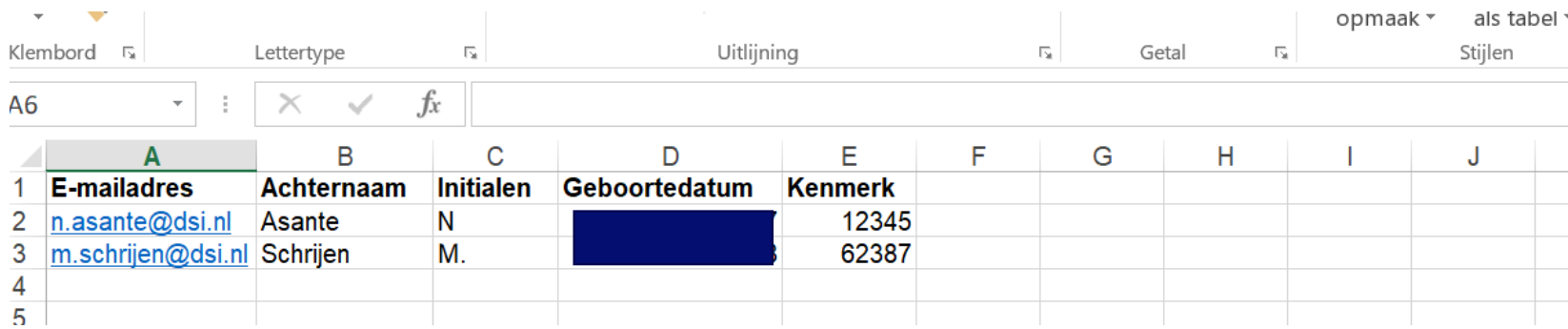
You will see the form shown below. This is a fixed format



The screenshot shows an Excel spreadsheet with the following structure:

	A	B	C	D	E	F	G	H	I	J	K
1	E-mailadres	Achternaam	Initialen	Geboortedatum	Kenmerk						
2											
3											
4											

Next, complete the list of employees that you would like to send invitations to. Save the form.



The screenshot shows the same Excel spreadsheet with data entered for two employees:

	A	B	C	D	E	F	G	H	I	J	K
1	E-mailadres	Achternaam	Initialen	Geboortedatum	Kenmerk						
2	<a href="mailto:n.asante@dsi.nl">n.asante@dsi.nl</a>	Asante	N		12345						
3	<a href="mailto:m.schrijen@dsi.nl">m.schrijen@dsi.nl</a>	Schrijen	M.		62387						
4											
5											

# Inviting employees using an Excel file

Use 'browse' to find the saved file, then import it into MijnDSI.

Under 'Recipients', you will see the employees added to the Excel form. The package you selected for the recipient will be shown under the heading 'Request type'.

Click on 'Next' at the bottom right of the green field to go to the invitation e-mail. Your employees will each receive an individual invitation with a link to the request portal.

[Bladeren...](#)

Selecteer een pakket

Importeer bestand

Ontvangers:

Kenmerk	Achternaam	Initialen	E-mailadres	Aanvraagtype	Register	Verwijder
				<div></div>		<div></div>

Volgende

Annuleren

# Certifications

In the **Certifications** tab heading, you can see an overview of your employees who are registered as a DSI Candidate Certified Professional or a DSI Certified Professional.

You can also make several changes on this page, generate reports and delete employees who no longer work at your organisation.

The screenshot displays the 'Mijn DSI' web application interface. At the top, there is a navigation bar with the 'DSi Mij DSI' logo on the left and a menu on the right containing 'Dashboard', 'Certificeringen' (highlighted), 'Facturaties', 'Mijn gegevens', and user icons. Below the navigation bar, the 'Certificeringen' section is titled. It includes a search bar labeled 'Zoeken en exporteren' with a sub-label 'Zoeken' and a placeholder 'Achternaam, register, status, kenmerk of registratienummer'. Next to it is a 'Geboortedatum' search field with a placeholder 'Geboortedatum' and a calendar icon. To the right of these fields are two green buttons: 'Exporteer' and 'Kenmerken importeren'. Below the search fields is a table with columns: 'Naam', 'Geboortedatum', 'Register', 'Status', 'Kennis', 'Vaardigheden', 'Integriteit', and 'PV'. Each column has a sort icon (up/down arrow). The 'Kennis', 'Vaardigheden', and 'Integriteit' columns have dropdown menus. The table contains one row of data for 'Jan Smit' with birth date '01-02-1970', registered at 'DSI Informeren Beleggen Retail', status 'Kandidaat gecertificeerd', and other fields set to 'Nee' or 'Ja'. A pagination indicator at the top right shows '1 to 1 of 1'.

Naam	Geboortedatum	Register	Status	Kennis	Vaardigheden	Integriteit	PV
Jan Smit	01-02-1970	DSI Informeren Beleggen Retail	Kandidaat gecertificeerd	Nee	Nee	Ja	



# Certifications | Search & Export

You can use the search screen to find all of your employees who are listed in a DSI register. You can search for employees by last name, register, status, reference number or registration number.

The system features a smart search function that requires you to enter just a few search terms to find a result. You can then export the data to an Excel file using the 'Export' button. Here you can also delete former employees and import characteristics for your employees.

Zoeken en exporteren

Zoeken

Geboortedatum

Exporteer

Kenmerken importeren

Naam ↑	Geboortedatum	Register	Status	Kennis	Vaardigheden	Integriteit	PV ↑
Jan Smit	01-02-1970	DSI Informeren Beleggen Retail	Kandidaat gecertificeerd	Nee	Nee	Ja	

# Certifications | Export data

To select all of your employees at once, click on the **‘Export’** button. This will export a list of your employees like the one shown in the Excel example below.

**Please note:** you will always export the data for the employees you filtered in the search screen. For example, if you filtered based on the status *Candidate Certified Professional*, then you will only export that overview.

Kopiëren

Plakken

Opmaak kopiëren/plakken

B

I

U

A

</

# Certifications | Sort & Filter

You can also sort and filter the fields in the Certifications tab heading.

## Sorting

Click on the arrow next to the name of the field you wish to sort.

## Filtering

Click on the eye icon to the right of the fields. This will allow you to make a selection of the fields you wish to see. The registration number is not selected as standard, for example, so you can select it yourself.

**Please note:** you will always export the data shown under 'Export data'.

Zoeken en exporteren

Zoeken

Achternaam, register, status, kenmerk of registratienummer

Geboortedatum

Geboortedatum

Exporteer

Kenmerken importeren

Naam ↑	Geboortedatum ↑	Register ↑	Status ↑	Kennis ↑	Vaardigheden ↑	Integriteit ↑	PV ↑
Jan Smit	01-02-1970	DSI Informeren Beleggen Retail	Kandidaat gecertificeerd	Nee	Nee	Ja	

☐ Registratienummer

☒ Naam

# Certifications | Delete former employees

Select the former employee you wish to delete, click on 'no longer an employee', and enter the date of termination. This will send an automated notification.

Details

Kenmerk

Registratienummer

100084561

Achternaam

Smit

Initialen

J.

Geboortedatum

01-02-1970

E-mailadres

jan@smit.nl

Uit dienst melden

Meld uit dienst

Datum van uitdiensttreding

Maak bericht

Annuleren

# Certifications | Import characteristics

You can add characteristics to individuals within your organisation. Click on 'Download overview' to download a list of all individuals and their current characteristics. Then you can add to the list. Please do not change the registration number. Upload the expanded file to import the new characteristics.

Kenmerken uploaden

Het is mogelijk om kenmerken toe te voegen aan de personen binnen uw organisatie. Klik op 'Download overzicht' om een lijst te downloaden met daarop alle personen en reeds aanwezige kenmerken. Vul de lijst aan en zorg daarbij dat het registratienummer ongewijzigd blijft. Upload het verrijkte bestand om de kenmerken te importeren.

**Organisatie**

Relatiebeheer DSI

Klik hier, of sleep bestand hierheen om te uploaden.

Download overzicht

Annuleren

# Invoices

This is where you can find an overview of all of your invoices. You can select invoices by entering the invoice date to brows for the specific invoice. You can also select one or more invoice and export them to an Excel file. Click on **Update** to refresh the invoice lines.

The Invoices heading is divided into three tabs: **Open invoices** | **Credit** | **All invoices**

 Mijn DSI

DashboardCertificeringen**Facturaties**Mijn gegevens

EN

Openstaande facturen

Credit

Alle facturen

Update

Factuurnummer

Factuurdatum

Factuurjaar

Export

☐ Selecteer alles

Factuurnummer

Factuurdatum

Factuurjaar

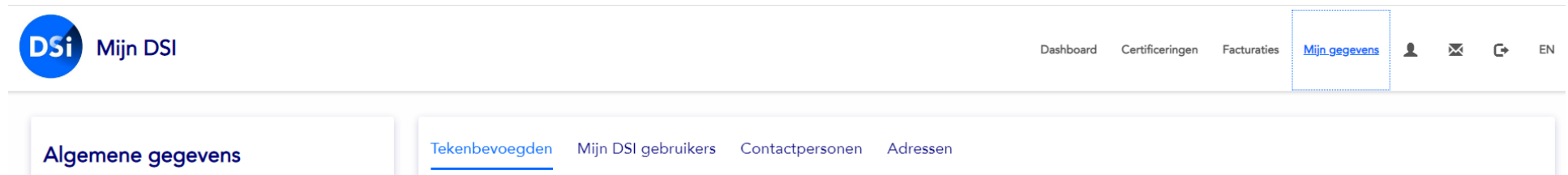
Totaalbedrag

# My details

This is where you can find an overview of your general details, contact persons and users. You can also submit a request to add new contact, and you can add users yourself. This is also where you can create an overview of authorised signatories for employer statements.

In addition to your organisation's general details, the My details page is divided into four tab headings:

**Authorised signatories | MijnDSI users | Contact persons | Addresses**



# My details

## General details

These are the participant's general details as known to DSI. If you would like to change any of the information, simply click on the 'Request a change' button.

***Please note:*** the chat function is not yet operational, so you cannot use this button to request changes at the moment. To request a change, send an e-mail to [relatiebeheer@dsi.nl](mailto:relatiebeheer@dsi.nl)

## Algemene gegevens

Naam

Relatiebeheer DSI

Rechtsvorm

Deelnemerstype

Certificering

Verkort proces

Nee

E-mailadres

Telefoonnummer

Wijziging aanvragen



# My details

## Authorised signatories

Authorised signatories are the individuals authorised by your organisation to sign employer's statements. Authorised signatories hold positions in management, the HR department or the Compliance department.

When you enter an authorised signatory here, your employees can select a signatory from the list to sign their employer's statement.

### Algemene gegevens

**Naam**  
Relatiebeheer DSI

**Rechtsvorm**

**Deelnemerstype**  
Certificering

**Verkort proces**  
Nee

[Tekenbevoegden](#) [Mijn DSI gebruikers](#) [Contactpersonen](#) [Adressen](#)

Zoeken

Bewerken

0 tot 0 van 0

+ Tekenbevoegde toevoegen

Initialen	Voornaam	Tussenvoegsel	Achternaam	Functie	E-mailadres
-----------	----------	---------------	------------	---------	-------------

# My details

## MijnDSI users

The portal differentiates between contact persons and users. The contact persons are administered by the DSI Relations Management team. Contact persons can enter changes in the portal and upload Excel files. Users can be added by either the DSI Relations Management team or a participant contact person. A user can only view the portal, and cannot make changes or invite employees to request a screening.

### Algemene gegevens

**Naam**  
Relatiebeheer DSI

**Rechtsvorm**

**Deelnemerstype**  
Certificering

**Verkort proces**  
Nee

TekenbevoegdenMijn DSI gebruikersContactpersonenAdressen

+ Nieuwe gebruiker toevoegen

1 tot 1 van 1

Naam	Aanhef	Email address
T Relatiebeheer		relatiebeheer@dsi.nl

# My details

## Contact persons

The DSI Relations Management team is responsible for adding new contact persons. You can request a new contact person by clicking on the button 'Request a new contact person'.

**Please note:** the chat function is not yet operational, so you cannot use this button to request changes at the moment. To request a new contact person, please send an e-mail to your Relations Management contact.

### Algemene gegevens

**Naam**  
Relatiebeheer DSI

**Rechtsvorm**

**Deelnemerstype**  
Certificering

**Verkort proces**  
Nee

**E-mailadres**

TekenbevoegdenMijn DSI gebruikersContactpersonenAdressen

+ Vraag nieuw contactpersoon aan

### Contactpersonen certificering

⏪ ⏩ 1 tot 1 van 1 ⏪ ⏩

Naam	Aanhef	E-mailadres
T Relatiebeheer		relatiebeheer@dsi.nl

# My details

## Addresses

This is where you can see your organisation's address details as they are known to us. It is also where you can add new addresses. You cannot change or delete addresses from this page, however. If you would like to change an address, you can notify your Relations Management contact.

### Algemene gegevens

**Naam**  
Relatiebeheer DSI

**Rechtsvorm**

**Deelnemerstype**  
Certificering

**Verkort proces**  
Nee

**E-mailadres**

TekenbevoegdenMijn DSI gebruikersContactpersonenAdressen

Zoeken

+ Nieuw adres toevoegen

1 tot 1 van 1

Ontvanger	Straat	Nummer	Plaats	Land	Type
Nana	Beursplein	5	Amsterdam	Nederland	BusinessAddress

# Questions & Contact



Hier begint vertrouwen

If you have any further questions, please feel free to contact your Certification Relations Manager via:



020 530 98 68



[n.asante@dsi.nl](mailto:n.asante@dsi.nl) of [relatiebeheer@dsi.nl](mailto:relatiebeheer@dsi.nl)

You can also contact the Certification department directly via:



020 620 12 74 (optie 2)



[certificering@dsi.nl](mailto:certificering@dsi.nl)

