

# Manual Certification MyDSI employer portal

July 2025 | v1.1

## Log in to MyDSI

You log in to <u>mijn.dsi.nl</u> with the login details you received. Make sure you copy your username exactly, including all periods, characters, and spaces. If you enter the wrong password multiple times, your account will be (temporarily) blocked. In that case, please contact DSI.

#### Change password

If you don't remember your password or it doesn't work anymore, you can click on 'I can't log in' and enter your email address. You will then receive information to create a new password.

l already have an account	
Username	I need an account
Password	Sign-up
	Public register
Sign in	View public register
Forgot Password	

# **DSI employer portal**

The MyDSI environment for the employer offers you various options as a contact person.

The structure of the employer portal consists of several menus:



Home Dashboard Certifications Invoices My details 👤 🖾 🕞 NL

- Dashboard
- Certification
- Invoicing
- My details

By clicking on one of the menus you will be taken to the underlying tabs.

To log out again, click on the icon at the top right.

# Dashboard

When you are logged in you will be taken to the dashboard. In the dashboard, you can manage all certification requests that are linked to your organization. In addition to searching and filtering, you can also directly invite your professionals for a certification application.

For an application for certification, <u>a screening at DISA</u> is a standard part of the registration procedure.



#### **Dashboard | Certification Request Status**

At the top of the dashboard, you can see an overview of the number of certification requests in the various phases. A number of active statuses have been merged into the blue blocks in terms of numbers. You can search for the detailed statuses in the 'status' filter.

Certification							
					<b>€</b> 1 of 1	page(s) 🍺 10 Reco	rds per page (total: 10
Search and invite							-
Characteristic	Last name		E-mailaddress	Date of B	irth	Application number	
				m/d/yyyy	,		
Start date	Organisation	Status		Register			
m/d/yyyy	DSI	~	Status 🗸	Register 🕶			Send invitation

#### **Dashboard | Certification Request Status**

- > New: the applicant has been invited and a certification application has been created to be started
- > Incomplete: the application is not yet complete and submitted
- Submitted : the application has been submitted to DSI and can be processed
- 1st assessment: the application is being processed by DSI
- > At DISA: the applicant has been invited for a Screening at DISA
- Control report: the screening report of DISA is available for verification at DSI
- > 2nd assessment: the application is checked for a second time on the basis of the 4-eyes principle
- Approved: the screening report has been issued and sent to the applicant. The certification application has been approved and the applicant is (candidate) certified in one of the relevant DSI registers.
- Incomplete: the application has been submitted to DSI incomplete and has therefore been returned to the applicant (the applicant will be informed of this)
- Archived: Inactive Cases

By double-clicking on an employee, you can see which phase of the request they are in.

#### **Dashboard | Search & Invite**

Here you can search the overview of the certification applications of your employees. You can send an invitation to the employees to request a certification.

By means of the various input filters, you can select the organization and make a selection of the employees. You can also make a selection based on status and register.

					<ul> <li>▲ 1 of 1 page(s) → 10 Records per page (total: 10</li> </ul>
Search and invite					-
Characteristic	Last name	Last name		Date of Birth	Application number
				m/d/yyyy	
Start date	Organisation	Status		Register	
m/d/yyyy	DSI	~	Status 🗸	Register 🕶	Send invitation

#### Certification

#### **Dashboard | View request details**

Click on the employee in the dashboard whose request you want to view and click on open request.

My DSI					Details
					Characteristic
Certification					Last name
					Klein
Search and invite					P.
Characteristic	Last name		E-mailaddress	Da	Date of birth
Start date	Organisation	Status	Register		Email address
m/d/yyyy	DSI	~ ) [	Status +	Register	
					Certification
Last name	Initials	Application type	Start date	R	Application status Report check
	P.	Certification	1/31/2023	D	Start date
					1/31/2023
					Register DSI Adviseren Beleggen Maatwerk Retail

#### **Dashboard | View request details**

You can then see in which phase of the application the employee is. You can also change the reference here, report the employee from employment or send an invitation.

Terug	
<b>Initialen</b> J.	Lopende aanvraag: 100060699 🚯
Achternaam P Geboortedatum	
Kenmerk	aanvraag gestart ingediend bij DSI aanvraag bij DISA aanvraag bij DSI goedgekeurd
Registratienummer	Alle Aanvragen van Jan P
Kenmerk wijzigen	Screeningen Certificeringen
Uit dienst melden	
Uitnodiging versturen	Datum Status Aanvraagnumme Werkgever Register Type

# **Dashboard | Inviting employees**

You can also invite your employees (individually or as a group) to apply for a certification via the portal. In addition, you can add a unique attribute such as an employee number and/or a cost center.

#### If you don't use the invitation tool

Employees can also apply for certification without an invitation. They can then only apply for a standard certification through <u>mijn.dsi.nl.</u> At the start of the application, the employee is not yet directly linked to you as an employer. They choose the employer they work for early in the application. Of course, they can only select employers who are also participants in DSI. Once the employer is selected by the applicant in the application, the application will be displayed in the portal.

# **Dashboard | Inviting employees**

To invite employees to a certification via the invitation field, click on the 'Send invitation' button. You can invite employees in two ways:

- 1. Invite employees based on email addresses
- 2. Inviting employees via an Excel import

Certification

			*	● 1 of 1 page(s) ▶ 10 Records per page (total: 10)
Search and invite				-
Characteristic	Characteristic Last name		Date of Birth	Application number
			m/d/yyyy	
Start date	Organisation	Status	Register	
m/d/yyyy	DSI	✓ Status ▼	Register 🔻	Send invitation

### Invite employees by email address

You can add individual email addresses of the employees here and send an invitation (each time).

Click the 'Based on Email Addresses' option and add the organization from the 'Invitation from organization' field.

Then click on 'add an email address' in the green bar.

Page Title		>
🔵 Email	Excel import	
Organisation	DSI	$\sim$
+ Add email address		

# Invite employees by email address

Fill in the blanks as much as possible. In addition to the e-mail address and last name, the Participants package field is also a mandatory field.

Then click on 'Next' to invite the employee(s).

Page Title							
Email	C Excel	import					
Organisation	DSI						~
+ Add email address							
Ontvangers							
Email address	Lastname	Initals	Date of birth	Person ID	Application package	Application package	<u> </u> Delete
			m/d/yyyy		~	~	
						Send invitat	ion Cance

# Invite employees by email address

#### Certification invitation email

The invitation email consists of a standard text. You can customize the invitation text yourself. It is important that you do not overwrite the hyperlinks. These links will direct the employee directly to the correct type of request.

By clicking on 'Send', it will be sent to the employee(s) you have imported with Excel or manually added per e-mail address. Here you have the choice to send the invitation email in Dutch or English.

Edit Send Invitations

Broncode     □    <	Language
B I U S X₂ X² IX ≔ ≔ ≇ ≇ ?? ♡ ≡ Ξ Ξ Ξ Μ 14 話→ ∞ ☜ ■ ♡ Ξ ② Ξ Ξ ③ Ω ⊑ ③	Dutch 🗸
Stiji         Normaal         Lettertype         Lett         A-         M         O         Co	
Geachte heer/mevrouw {% <u>FullName</u> %},	
Welkom bij Stichting DSI. DSI richt zich op een beleggingssector waar professionals vakbekwaam zijn en integer handelen.	
U bent werkzaam in deze sector als professional. Vandaar dat u bent uitgenodigd door uw werkgever om een certificering aan te	
vragen voor één van onze registers	
div p	



×

#### Invite employees via Excel file

You can import a group of employees at the same time to send an invitation.

Click on the option 'Via an Excel import' and add the organization from the field 'Invitation from organization'. Then click on 'Download sample template' to fill in the correct template.

Uitnodiging(en) versturen				×							
O Dp basis van E-mailadressen 🔘 Via een Excel import											
Uitnodiging vanuit organisatie:				~							
U wilt uw medewerkers laten screenen/Certificeren.	U wilt uw medewerkers laten screenen/Certificeren.										
U kunt hier uw medewerkers middels een Excelbestand uploaden in het systeem De medewerkers zijn dan al bij DSI bekend. U kunt hier het Excelbestand voor de	an DSI. upload downloaden.										
Om het Excelbestand te vullen heeft u de volgende gegevens nodig: download e Let op dat de datum ingevoerd wordt op de volgende manier: dd-mm-jjjj	en voorbeeld template	e via onderstaande button.									
Voorbeeld template downloaden											
	Bladeren	Selecteer een pakket	~	Importeer bestand							

## Invite employees via Excel file

#### You will receive the form below. This is a fixed format.

-	<b>—</b>			· · · · ·						pmaak 👻	als tabel 🔻
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	Α	В	С	D	E	F	G	Н	I	J	K
1	E-mailadres	Achternaam	Initialen	Geboortedatum	Kenmerk						
2											
3											
4											

#### Then complete the list with the employees you want to invite. Save the form.

Klembord 5		Lettertype	Es.	Uitlijni	ng		Est.	Getal	Es.	opmaak *	als tab Stijlen	oel ₹
A6	·	× < .	fx									
	Α	В	С	D	Е	F	C	Э Н		I	J	
1	E-mailadres	Achternaam	Initialen	Geboortedatum	Kenmerk							
2	n.asante@dsi.nl	Asante	Ν	23-11-1977	12345							
3	m.schrijen@dsi.nl	Schrijen	М.	29-2-1988	62387							
4												
5												

16

### Invite employees via Excel file

You can look up the saved file via browsing and then import it into MyDSI. Select the (correct) participant package before clicking on 'Import file'.

You will then see the employees you have added to the Excel form **under 'Recipients'**. The package you have selected will appear under the heading Request type for the recipient.

Then click on 'Next' at the bottom right of the green highlighted box and you will be taken to the invitation email. Your employees will each receive a separate invitation email with a link to the application portal.

			Bladeren	Selecteer een pakket	~		Importeer bestand
Ontvangers:							
Kenmerk	Achternaam	Initialen E	-mailadres	Aanvraagtype		Register	Verwijder
					~		8
							Volgende Annuleren

### Certification

Under the Certifications tab , you will find an overview of the employees who are registered as DSI Candidate Certified or DSI Certified.

On this page you can make various mutations. For example, you can run reports, import characteristics and report employees from employment.

Mijn DSI		Dashboard Certificeringe	en Facturaties Mijn gegevens 💄 🔀 🕞 EN
Certificeringen			k/ ≪/ 1 to 1 of 1 🕪 🕅
Zoeken en exporteren Zoeken Achternaam, register, status, kenmerk of registratienummer	Geboortedatum Geboortedatum		Exporteer Kenmerken importeren
Naam I Geboortedatum I Register	t Status t Kennis	t Vaardigheden	Integriteit     Image: PV Image:
Jan Smit 01-02-1970 DSI Informeren Beler	gen Retail Kandidaat gecertificeerd Nee	Nee	Ja

# **Certifications | Search & Export**

In the search screen, you can find an overview of all your employees who are in a DSI register. You can search by last name, registry, status, reference or registration number.

The system has a smart search system, which means that you only have to type in a few characteristics to get a result. Via the **'export'** button you can export data to an Excel file. In addition, you can also report employees out of employment and import characteristics of employees.

Zoeken en e	xporteren												-
Zoeken Achternaa	m, register, status, kenmerk of	registratienummer		Ge	a <b>boortedatum</b> Geboortedatum					Exporteer	Kenme	rken importer	en
Naam ‡	Geboortedatum	‡ Reg	jister	ţ	Status t	ŀ	Kennis t	Vaardigheden ~	ţ	Integriteit	ţ	PV ‡	۲
Jan Smit	01-02-1970	DSI	Informeren Beleggen Re	ətail	Kandidaat gecertificeerd	Ν	Nee	Nee		Ja			

# **Certifications | Export data**

Select the employees at once by clicking Export. An overview of the employees is then exported as in the example below in Excel.

**Note:** you always export the data of the employees you have filtered in the search screen. If you have filtered on the basis of, for example, the status candidate *certified*, you can also export this overview. If you have not applied a filter, the data of all employees will be exported.

Plak	ken 💉 (	Kopiëren 👻 Opmaak ko	piëren/plakken	BIU	·		Samenvoegen en centreren	★ % 000   €,0,00     ★,0,00     ★,0	 Voorwaardelijke Opr opmaak ∗ als †	naken Ne	utraal	On	igeldig	▼ Invoegen Verwijderen Op
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A1		-	X ✓	fx Aan	hef									
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	Α	В	с	D	E	F	G	н	I	J	К	L	М	Ν
1	Aanhef	Initialen	Tussenvoegsel	Achternaam	Registratienummer	Geboortedatum	Register	Status	Organisatie	Kenmerk	Integriteit	Kennis	Vaardigheden	Permanent vakbekwaam
2	heer	J.		Smit	100084561	01-02-1970	DSI Informeren Beleggen Retail	Kandidaat gecertificeerd	Relatiebeheer DSI		Ja	Nee	Nee	
3														
4														
5														
6														
7														
8														

#### The certification | The sorter & filters

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

#### Sort

Click the down and up arrow next to the name of the field you want to sort.

#### Filter

Click on the eye to the right of the fields. You can then make a selection of the fields you want to see. The registration number is unchecked by default and you can therefore check it yourself, for example.

#### Note: you always export the data as indicated in exporting data.

Search and export	ŧ									-
Search advi			Date of birth		Status		~		Export	Upload characteristics
Last name ‡	Date of birth	ţ	Register ‡	Status ‡	Knowledge ~	ţ	Skills ~	ţ	Integrity ~	t PE t
			DSI Adviseren Beleggen Standaard Retail	Candidate	No		No		No	Registration ID  Last name  Date of birth

# **Certifications | Report termination of employment**

**employment** Click on the employee you want to report out of employment and then click on 'Report out of employment'. Enter the date of termination of employment and click on 'Continue'. An automated

message is sent.			
Details	×		
Characteristic			
Registrationnumber		<sup>c</sup> Set date of unemployment	×
Last name		Date of up employement	
Initals		g m/d/yyyy	
Date of birth		c	
Email address		c	Continue Cancel
Start date registration			
2/27/2021			
Months of experience More than 12 months			
Register			

#### **Certifications | Import attributes**

It is possible to add characteristics to the people within your organization. Click on 'Download overview' to download a list with all persons and existing characteristics. Complete the list, making sure that the registration number remains unchanged. Upload the enriched file to import the attributes.

Upload characteristics

×

It is possible to add characteristics to the persons within your organization. Click on 'Download overview' to download a list with all persons and already present characteristics. Complete the list, making sure the registration number remains unchanged. Upload the enriched file to import the characteristics.

#### Organisation

DSI ~ Click here, or drop files here to upload.

Download overview Cancel

# Invoicing

You will find an overview of all your invoices here. Here you can make a selection by, for example, entering the invoice date and searching for the corresponding invoice. You can also select one or more invoices here and export them to Excel. To refresh the invoice lines, click **Update**. By clicking on the 'Averages' button, you will see the number of average registrations invoiced per year.

Invoicing is divided into three tabs: Open invoices | Credit | All invoices

**Openstaande facturen** 

Credit

Alle facturen 🛛 💭 Update

Jaarlijks wordt één tarief per certificering vastgesteld en deelnemers ontvangen slechts één jaarlijkse factuur, ongeacht het aantal wijzigingen dat gedurende het jaar wordt doorgevoerd. Deze jaarlijkse factuur is gebaseerd op het gemiddelde aantal certificeringen over de afgelopen drie jaar. Hier is het aantal certificeringen per jaar te zien waarmee in het gemiddelde gerekend wordt.

Factuurnummer		rdatum	Factuurjaar	
	Vul ee	n datum in	Vul een jaar in	Export
Selecteer alles	Factuurnummer	Factuurdatum	Factuurjaar	Totaalbedrag

Gemiddelden

Here you will find an overview of your general details, contacts and users. Here you can also upload your company logo and add users yourself. In addition, you can also add e-mail domains to where the employer's statement is sent.

In addition to your organization's General Information, My Information is divided into five tabs:

Organisation(s) | Email Domains | My DSI users | Contacts | Addresses



#### General information

The general data of the participant as known to DSI. If you want to change the details, please send an e-mail to <u>relatiebeheer@dsi.nl</u>. We ensure that the data is adjusted.

General	
Visible name	
Name	
Participantstatus Certification	
Short process	
Yes Email address	
Phone number	
	Request change

#### Organization(s)

Here you can upload the company logo that is displayed in the DSI Public Register. Click on 'Change image' and then upload your company logo.

E-mail domeinen Mijn DSI gebruikers Contactpersonen Adressen Organisatie(s) Organisatie: DSI 123 Wijzig Afbeelding

#### Email domains

When applying for certification, in many cases a statement is sent to the employer to confirm whether the application has 12 months of work experience with regard to the register. In this overview, it is possible to allow only a limited number of domains, to which the 12-month request can be sent (denk@bedrijfsnaam.nl and variants daarop\_).

#### Allowed email domains Allowed to sign Users Contactperson Addresses

When applying for certification, in many cases a statement is sent to the employer. With this statement it is possible to allow only a limited number of domains. When the statement is empty all non-private addresses are allowed.

New Edit Delete

🖌 📢 0 to 0 of 0 🅨 🔰

Allowed email domain

#### My DSI users

In the portal, a distinction is made between contacts and users. The contacts are managed by DSI's Relationship Management. The contacts can make changes in the portal and they can upload Excel lists. The users can be added by both DSI Relationship Management and by a contact person. A user can only look into the portal and cannot make any changes or invite employees.

Search       Edit         Initals       First name       Middle name       Last name       Position       Email address	Allowed email do	omains Allowe	d to sign Users	Contactpersor	n Addresses		
Initals First name Middle name Last name Position Email address	Search Edit					M 📢 0 to 0 of 0 🍽 M	+ ACT Create allowed to sign
	Initals	First name	Middle name	Last name	Position	Email address	-

#### Contacts

Entering a new contact is managed by DSI's Relationship Management. To request a new contact, please send an e-mail to <u>relatiebeheer@dsi.nl</u>.



#### Addresses

Here you will find the address details of your organization as known to us. You can also add a new or additional address. You can't change or delete an address. If you want to make a change of address, you can send an e-mail to <u>relatiebeheer@dsi.nl</u> to make changes.



#### **Questions & Contact**



If you have any additional questions, please contact our Relationship Manager **Nana Vos-Asante** at:



You can also contact our Customer Care Officers at:



