



Animal &
Plant Health
Agency

APHA Briefing Note 31/24

Enhancements to the Certifier Portal of Export Health Certificate Online Service

Date issued: 12 September 2024, updated 18 October 2024 and 18 November 2024

Amendments are highlighted in yellow.

Purpose

1. To inform Certifying Officers (Official Veterinarians (OVs) and Food Competent Certifying Officers (FCCO)) located in England, Scotland, and Wales of enhancements that are being made to the Certifier Portal on the Export Health Certificate (EHC) Online service.

Background

2. Following feedback provided by Certifying Officers, a number of enhancements have been planned to provide improvements to the Certifier Portal of the EHC Online service.
3. A list of enhancements being made to the EHC Online service, and the implementation dates can be found in the [Appendix](#).

Further Information

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Appendix

The following enhancements to the EHC Online service and the implementation dates are:

- Admin users of the EHC Online service are now able to update the organisation email address which receives notifications of updates to applications made on EHC Online (implementation date 5 September 2024):
 - Admin users will see a new hyperlink on the certifier dashboard named 'Practice email'
 - Clicking this will take the user to another screen which will show the email address currently associated to the organisation
 - From here, users can enter the email address where notifications should be sent into the text field. Clicking save and continue will update and give the user a success message.
 - If the email address is correct and does not require to be changed, users can click the 'back' button to return to their main dashboard screen.
- Certifier users are now able to cancel multiple certificates from within the same case in a single action (Implementation date 16 October 2024):
 - This should be used for caseload management and is a way to efficiently cancel certificates that will not be used
 - To use this function, users should first navigate to 'Cases to Review' card and then the 'Case Summary' page on a case which has more than one certificate. On this screen, the user will see the addition of a 'cancel' button and just underneath it, a checkbox.
 - Clicking this checkbox will select all certificates in the case which are in an 'Open' state, i.e. a decision (Approved, Rejected, Cancelled) has not already been applied to that certificate. To manually add a certificate to the selection, users can click the checkbox next to a certificate record. To remove a certificate users can deselect the checkbox next to a certificate record.
 - Clicking the 'cancel' button with no certificates selected for cancellation will give an error message to the user which will prevent the user from proceeding until at least one certificate is selected
 - Once certificates are selected, clicking the 'cancel' button will take the user to the 'Record Decision' page. Here, the user can see the certificates which have been selected for cancellation. Users can click the 'back' button within the service to return to the 'Case Summary' screen to amend the selection.

- To proceed with cancelling the selected certificates, users should add their name and SP or NV number as usual. Clicking the green 'Accept and submit' button at the bottom of the page will cancel all of the certificates summarised on the page.
- As from 30 October 2024, certifiers are now able to assign Certificates from within a case to an individual from their Certifier Organisation. This can be used to offer a visual indication that a certificate in a 'block' case is in use, reducing the possibility that two users will be using the same certificate for different consignments. This is an entirely optional step, users can still certify a consignment without assigning the certificate to themselves or a colleague :
 - Users should navigate to the dashboard and enter a case by clicking the 'Summary' link. On the case summary screen, users will see a new 'Assigned' heading. This will show which user from an organisation a certificate is currently assigned to. If no user is assigned the value will be 'Unassigned'.
 - To assign an individual certificate, press the 'review certificate' link to open the certificate review page. Clicking assign will take the user to the assign page. Clicking 'assign to me' will assign the logged-in user to the certificate. Clicking 'assign someone else' will reveal a text box where the user can search for the name of a colleague from within the same organisation. Clicking the green assign button will take the user back to the review page and the selection will be recorded on both the review and case summary pages. Clicking 'assign' with no user selected will throw an error message instructing the user to choose an assignee
 - To change a certificate's assignee, repeat the above steps selecting the desired assignee and the record will update with the new assignee.
- Following feedback from users, enhancements to the filtering capability have been made. Certifier users now have more flexibility when filtering their cases by export date. This can be used for more effective workload management and is a feature which can be used on all the dashboard cards on the certifier portal (Implementation date 30 October 2024):
 - Users can now select to filter their cases by those with an export date of:
 - 'Today'
 - 'Tomorrow'
 - 'Next 7 days'
 - 'This month'
 - 'Last 7 days'
 - 'Last month', and

- 'Custom'.
- Selecting 'Custom' will allow the user to set their own start and end date parameters to filter the dashboard. To use this feature the start date must be a real date and be a date prior to the end date. Entering an invalid date or a start date which is not prior to the end date will result in an error message being displayed, instructing the user to enter valid dates.
- Improvements have been made to the main certifier dashboard based on user feedback (Implementation date 13 November 2024):
 - Certifier users will now see a new dashboard card titled 'Certificates Assigned to Me'. Clicking on this card directs the user to a list of cases with at least one certificate assigned to them. Users can then access these cases and view their assigned certificates. This card will only display certificates that have no recorded decision
 - Additionally, the 'All Cases' link has been replaced by a link to generate a report for all certificates within the organisation. This feature provides an easy-to-manage overview of certificates, allowing data filtering for more effective workload management. The report, downloaded in .csv format, includes details for each certificate such as:
 - serial number,
 - case ID,
 - EHC template number,
 - status,
 - export date,
 - applicant,
 - exporter name,
 - destination country,
 - applicant reference, and
 - the certifying officer's SP number (included only for certificates certified after 14 November 2024)
 - Certifier users can also now sort dashboard cards by any table header. To sort, click on any header with an arrow; clicking once sorts A-Z or earliest to latest, while a second click reverses the order to Z-A or latest to earliest
 - In addition, certifiers can now add notes to certificates. Information such as progress, required changes, or inspection results can be recorded on a certificate, and all organisation members can view these notes. To add a note, navigate to the certificate review page, where a 'Notes' section displays an 'Edit' link. If no notes are added, the section will display 'None'
 - To add a note, click the 'Edit' link to open a page listing the certificate serial number and a text area allowing up to 1,000 characters. After entering the

text, click 'Save and Continue' to save the note. This will return the user to the review page, where the note will now appear on the record. Users can amend or remove notes by clicking 'Edit', updating or clearing the text, and saving the changes.

Further notifications of additional enhancements will be added once they are available.