



Managing Grants and Benefits

last updated for the Spring 2018 release

Handbook

CAPITA

Revision History

Version	Published on
Spring 2018 (3.65) - 1.0	23/05/2018

Doc Ref

Managing Grants and Benefits Handbook/Spring 2018/2018-05-23

© Capita Business Services Ltd 2018. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher. Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

www.capita-one.co.uk

Contacting One Application Support

You can log a call with One Application Support via the Customer Service tool available on [My Account](#).

Providing Feedback on Documentation

We always welcome comments and feedback on the quality of our documentation including online help files and handbooks. If you have any comments, feedback or suggestions regarding the module help file, this handbook (PDF file) or any other aspect of our documentation, please email:

onepublications@capita.co.uk

Please ensure that you include the document name, version and aspect of documentation on which you are commenting.

Contents

01 / Introduction to Grants and Benefits	1
Overview of Grants and Benefits	1
Using this Handbook	1
What's New in this Release?	1
Permissions	2
Setting Up and Administering Grants and Benefits	3
Introduction	3
Setting Up Grants and Benefits Checklist	3
Setting Up a National Asylum UDF	3
Maintaining Claim Categories	3
Adding a Claim Category	4
Viewing Claim Categories, Items and Item Defaults	5
Editing a Claim Category	5
Deleting a Claim Category	6
Adding Items to a Category	7
Editing Items	9
Deleting Items	10
Managing Item Defaults	11
Default End Date and Review Date Options	11
Adding Item Defaults	11
Editing Item Defaults	14
Deleting Item Defaults	15
Setting Active Status for Categories and Items	16
Setting the Active Status for a Category	16
Setting the Active Status for an Item	17
Adding an Eligibility Check Link	18
Editing an Eligibility Check Link	20
Deleting an Eligibility Check Link	21
Managing Agencies	21
Adding an Agency	21
Editing Agency Details	22
Module Behaviour Options	23
ECS Validation Firewall Access	24
Editing the Module Behaviour Options	24
Understanding the User Defaults Options	25
Editing the User Defaults Options	25
Configuring Serial Numbering	26
02 / Creating a New Grants and Benefits Application	29
Introduction	29

Claims with Multiple Dependents	29
Creating a New Grants and Benefits Application (Student-Centric)	29
Creating a New Grants and Benefits Application (Parent-Centric)	36
Adding a New Student to the One Database	43
Adding a New Parent/Carer to the One Database	43
Opening an Existing Application	43
Viewing All Applications for a Student	44
Updating Parental Responsibility	47
Editing National Insurance Number and Asylum Seeker Details	50
Editing Claim Details	51
Editing Authorisation Status	52
Deleting an Existing Application	52
Recording Payment Details	53
Editing Payment Details	55
Deleting Payment Details	55
Viewing Grants and Benefits Claim Details for a Student	55
Updating a Claim Cost	56
Batch Processing	57
Updating Multiple Applications via Batch Processing	57
Checking Free School Meal Eligibility	61
Eligibility Checking Service (ECS) Validation for Individual Applicants	61
Interpreting the Qualifier Code	62
Viewing Parent/Carer Eligibility Checking Service (ECS) History	62
Eligibility Checking Service (ECS) Validation for Multiple Applications	62
Aborting an ECS Validation	65
Troubleshooting an ECS Validation Failure	67
03/ Maintaining Parent/Carer Details	69
Introduction	69
Adding a Dependent	69
Viewing Dependents	72
Verifying Individual FSM Eligibility	73
Setting Dependent Addresses	74
Adding Benefit Claims	75
Viewing Benefit Claims	77
Editing a Benefit Claim	79
Deleting a Benefit Claim Record	80
Viewing Grants and Benefits Claim Details	81
04/ Managing Reports	84
Overview	84
ECS BatchValidation FailedList	84
ECS BatchValidation ProcessedList	85
G&B Claims	85

05 / Appendix	88
One v4 Online Common Functionality	88
FSM Data and the FSM History Scheduled Task	88
Overview	88
Where is FSM data stored in the One database?	89
FSM History Scheduled Task	90
Index	91

01 / Introduction to Grants and Benefits

Overview of Grants and Benefits

Grants and Benefits (G&B) is a separately licensed part of the Applications module within One v4 Online.

G&B records and maintains funding claim applications raised by parents, carers or students. It can maintain the payments, dependent details, benefits lists and fund details for the records it creates.

Generally, applications for funding is in the form of Free School Meals (FSM), but can also cover other funding that may be available from the government and managed by the LA.

After a G&B application is approved, the details are incorporated into the relevant areas of One.

Using this Handbook

This handbook is intended for One administrators and users of the G&B area. The first chapter of this handbook covers the configuration of G&B and the rest of the handbook covers day-to-day usage of the software.

What's New in this Release?

To help you identify changes made to this document, content that has been updated for the most recent release is highlighted in yellow.

- The handbook has been updated for the Spring 2018 Service Pack 1 as follows:
 - When the result of an individual ECS check is Not Found, a qualifier code is also returned. This is interpreted and displayed on the eligibility result screen. For more information, see [Eligibility Checking Service \(ECS\) Validation for Individual Applicants](#) on page 61.
 - When an ECS Batch validation check is carried out and the result is Not Found, a qualifier is returned and stored on the individual check record. For more information, see [Eligibility Checking Service \(ECS\) Validation for Multiple Applications](#) on page 62.
 - The ECS History window includes a new column to display the qualifier where a Not found result is received. For more information, see [Viewing Parent/Carer Eligibility Checking Service \(ECS\) History](#) on page 62.

Permissions

G&B uses business processes to determine the user groups that have access to specific functionality. User groups are assigned Read, Read-Write, Read-Write-Delete or Deny permissions to each G&B business process. Permissions are maintained in the One v4 Client. The following table outlines the permissions required to access specific areas of the G&B software in v4 Online.

Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete	Deny
GNB				✓	
	Bank Details		✓	N/A	
	Grants and Benefits			✓	
Bases	Permissions for these main business processes can be set to whatever the required level is for the selected user group, however they <u>cannot</u> be set to Deny.				
Student Data					
Person Administration					

IMPORTANT NOTES:

The Bank Details business process only affects local authorities in Northern Ireland. Local authorities with a different locale will see no change to system behaviour, regardless of the access assigned to this business process.

After setting G&B permissions, One sets permissions for the CIEE main business process automatically. This occurs even if your site does not have a CIEE licence. The permissions set for the CIEE main business process are not sufficient to administer CIEE, and additional permissions are required for groups that will also administer CIEE.

More Information:

RG_Permissions reference guide available from the One Publications website (<http://www.onepublications.com>).

02 / Setting Up and Administering Grants and Benefits

Introduction

The **Administration** area of Grants and Benefits (G&B) enables you to configure how the software works as well as maintain categories, agencies, eligibility checks and claim serial numbers.

Setting Up Grants and Benefits Checklist

In order to process grant and benefit claims, a One system administrator must set up the system. For most customers, the settings are maintained when migrating from One v3 to the One v4 Online version of G&B.

Complete the following checklist to configure Grants and Benefits:

- For customers not migrating an existing instance of Grants and Benefits from v3, create a NASS UDF. For more information, see [Setting Up a National Asylum UDF](#) on page 3.
- Add new claim definitions categories via the **Administration | G&B | Claim Definition** tab. For more information, see [Maintaining Claim Categories](#) on page 3.
- Set up item defaults that are entered automatically when a specific item is added to a claim via the **Administration | G&B | Claim Definition** tab. For more information, see [Managing Item Defaults](#) on page 11.
- Configure module-wide behaviours via the **Administration | G&B | Module Behaviour** tab. For more information, [Editing the Module Behaviour Options](#) on page 24.
- Define user defaults that can be applied to each new claim via the **Administration | G&B | User Defaults** tab. For more information, see [Editing the User Defaults Options](#) on page 25.
- Add agencies via the **Administration | G&B | Manage Agencies** tab. For more information, see [Managing Agencies](#) on page 21.
- Define serial numbers for claims via the **Administration | G&B | Fund Serial Number** tab. For more information, see [Configuring Serial Numbering](#) on page 26.

Setting Up a National Asylum UDF

A User Defined Field (UDF) with the name NASS is required for G&B to process applications that use a National Asylum Support Service (NASS) number instead of a National Insurance (NI) number. For Local Authorities that are migrating an existing instance of G&B from One v3, the required UDF is created automatically during the migration process. For customers that never used G&B in the v3 Client, a new UDF should be created with the name NASS, using the v4 Client. For more information on creating UDFs, please refer to the *RG_Administration_Managing_UDFs* document, available from My Account and the One Publications website (<http://www.onepublications.com>).

Maintaining Claim Categories

All applications must be associated with a claim category. Although G&B provides a wide range of pre-defined claim categories, you can edit existing categories and add new ones to meet your requirements. After creating a claim category, you must then add individual items to the category.

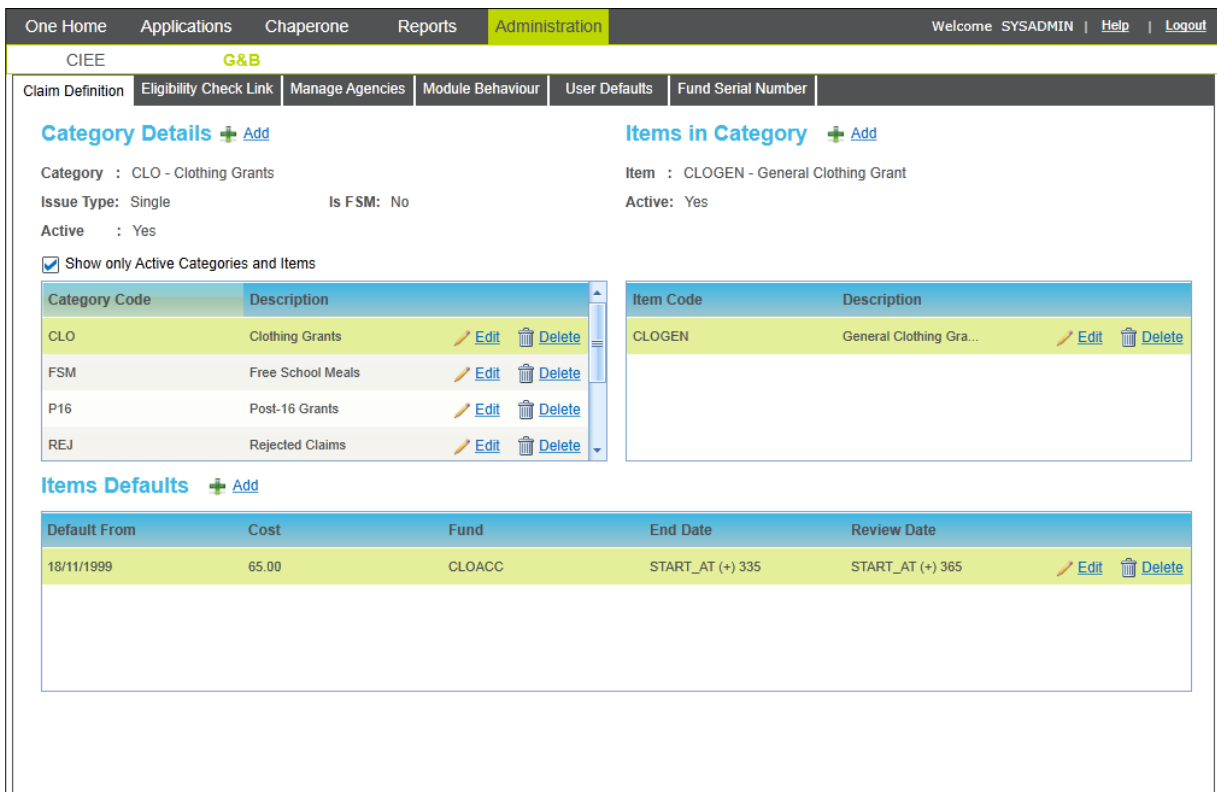
Claims can have either a single or multiple **Issue Type**. If a category has an **Issue Type** of **Single**, an applicant can have only one active claim (regardless of authorisation status) for that category at any time; i.e. the start and end dates for each claim cannot overlap. You can create a claim with a start date in the future if there is currently no active claim. An **Issue Type** of **Multiple** means that a person can have multiple active claims for the category at the same time.

More Information:

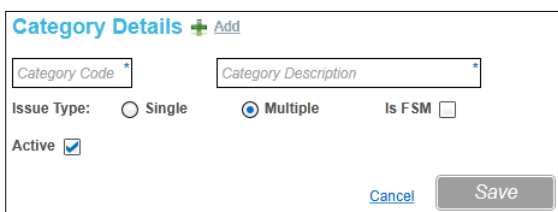
- [Adding a Claim Category](#) on page 4
- [Managing Item Defaults](#) on page 11
- [Setting Active Status for Categories and Items](#) on page 16
- [Adding Items to a Category](#) on page 7

Adding a Claim Category

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is selected.



3. Click the **Add** hyperlink in the **Category Details** section to display editable fields relating to category details.



4. Enter a **Category Code**.
5. Enter a **Category Description**.
6. Select the required **Issue Type** radio button.

- If required, select the **Is FSM** check box.

NOTE: If you do not want the category to be immediately available to users, deselect the **Active** check box.

- Click the **Save** button.

Viewing Claim Categories, Items and Item Defaults

- Select the **Administration** area and select the **G&B** page.
- Ensure the **Claim Definition** tab is selected.

If the category is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

The screenshot shows the 'Administration' section of the system, specifically the 'G&B' (Grants and Benefits) page. The 'Claim Definition' tab is active. The interface is divided into three main sections:

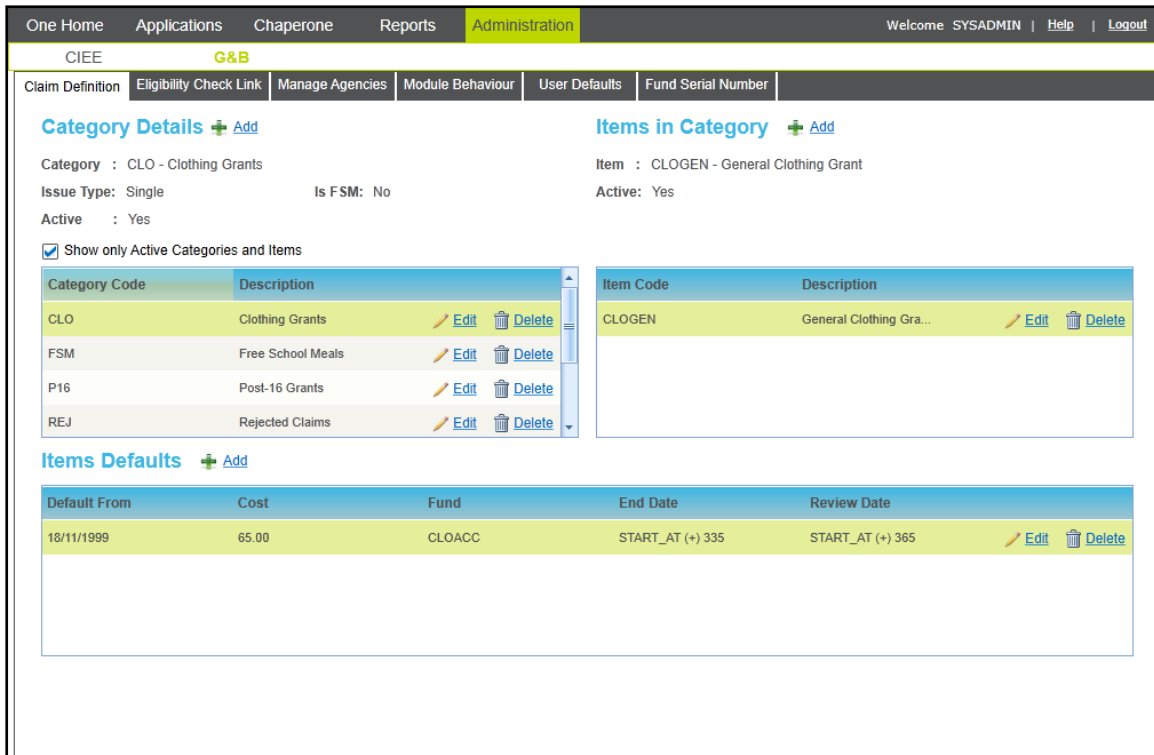
- Category Details:** Shows details for the selected category 'CLO - Clothing Grants'. It includes fields for 'Issue Type: Single', 'Is FSM: No', and 'Active: Yes'. A checkbox labeled 'Show only Active Categories and Items' is checked.
- Items in Category:** A table listing items associated with the category. The selected item is 'CLOGEN - General Clothing Grant', which is active.
- Items Defaults:** A table showing default values for the selected item, such as 'Default From: 18/11/1999', 'Cost: 65.00', 'Fund: CLOACC', 'End Date: START_AT (+) 335', and 'Review Date: START_AT (+) 365'.

- Highlight a category to display the associated items in the **Items in Category** area.
- Highlight an item in the **Items in Category** area to display the item defaults in the **Items Defaults** area.

Editing a Claim Category

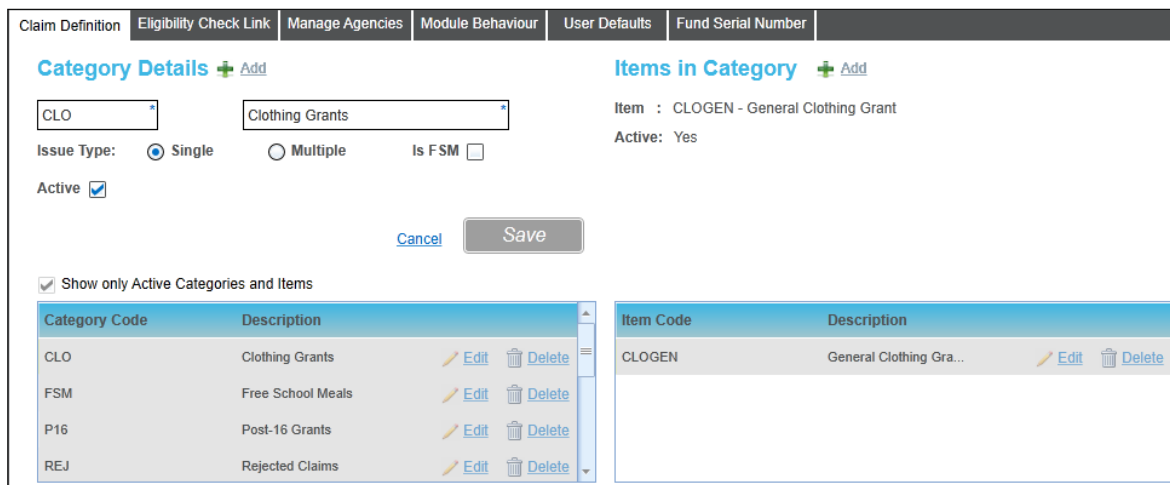
Claim category details can be edited. However, if the category has associated items, the **Category Code** cannot be edited.

- Select the **Administration** area and select the **G&B** page.
- Ensure the **Claim Definition** tab is open.



3. In the **Category Details** area, click the **Edit** hyperlink for the category you wish to edit.

If the category is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.



4. Make the required changes.
5. Click the **Save** button.

Deleting a Claim Category

If a claim category is no longer required, it can be deleted only if there are no items associated with it. If a category has associated items, you must delete them before you can delete the category.

To delete a claim category:

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

The screenshot shows the 'Administration' section of the CIEE G&B system. The 'Claim Definition' tab is active, displaying details for the 'CLO - Clothing Grants' category. The 'Items in Category' section shows one item, 'CLOGEN - General Clothing Grant'. Below this, the 'Items Defaults' table is visible.

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

- For the category you wish to delete, click the **Delete** hyperlink to display the **Maintain Claim Category Details** dialog.

If the category is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

- Click the **Yes** button to delete the category.

Adding Items to a Category

After creating a category, it must have individual items added to it. Items are required because claim applications are made against specific items (not categories).

- Select the **Administration** area and select the **G&B** page.
- Ensure the **Claim Definition** tab is open.

Setting Up and Administering Grants and Benefits

One Home Applications Chaperone Reports Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number

Category Details + Add

Category : CLO - Clothing Grants Item : CLOGEN - General Clothing Grant

Issue Type: Single Is FSM: No Active: Yes

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Items Defaults + Add

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

- In the **Category Details** section, select the category to which you wish to add an item. Any items that already exist for the category are displayed in the **Items in Category** section.

One Home Applications Chaperone Reports Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number

Category Details + Add

Category : SAM - Documentation test category Item :

Issue Type: Multiple Is FSM: No Active: Yes

Show only Active Categories and Items

Category Code	Description	Edit	Delete
TRA	Transport	Edit	Delete
CGE	Clothing General	Edit	Delete
DIS	Discretionary	Edit	Delete
SAM	Documentation test c...	Edit	Delete

Item Code	Description
No results found	

Items Defaults + Add

Default From	Cost	Fund	End Date	Review Date
No results found				

- In the **Items in Category** section, click the **Add** button to display editable fields relating to item details.

Items in Category + Add

SAM

Active

[Cancel](#) [Save](#)

5. Enter an **Item Code**. The three character code entered here is concatenated with the existing category code to create the full item code.

NOTE: The **Item Code** cannot be edited after the item is saved.

6. Enter an **Item Description**.

NOTE: If you do not want the item to be immediately available to users, deselect the **Active** check box.

7. Click the **Save** button.

The item is added to the **Items in Category** list.

More Information

[Adding Item Defaults](#) on page 11

Editing Items

The **Active** status and the **Item Description** of an item can be edited. Once created, the **Item Code** cannot be edited.

1. Select the **Administration** area and select the **G&B** page
2. Ensure the **Claim Definition** tab is open.

The screenshot shows the 'Administration' section of the system, specifically the 'G&B' (Grants and Benefits) area. The 'Claim Definition' tab is active. The interface is divided into several sections:

- Category Details:** Shows 'Category : CLO - Clothing Grants', 'Issue Type: Single', 'Is FSM: No', and 'Active : Yes'. A checkbox 'Show only Active Categories and Items' is checked.
- Items in Category:** A table listing items under the 'CLO' category. The first item is 'CLOGEN - General Clothing Grant' with 'Active: Yes'.
- Items Defaults:** A table with columns for 'Default From', 'Cost', 'Fund', 'End Date', and 'Review Date'. The first row shows '18/11/1999', '65.00', 'CLOACC', 'START_AT (+) 335', and 'START_AT (+) 365'.

3. In the **Category Details** area, highlight the category for the item you wish to edit to display a list of items in the **Items in Category** area.

If the category or item is already inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. Click the **Edit** hyperlink for the item you wish to edit.

5. Make the required changes.
6. Click the **Save** button.

Deleting Items

An item can be deleted only if it is removed from all claims and all the associated item defaults have been removed from it.

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

3. In the **Category Details** area, highlight the category for the item you wish to delete to display a list of items in the **Items in Category** area.

If the category or item is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. For the item you wish to delete, click the **Delete** hyperlink to display the **Maintain Claim Item In Category Details** dialog.
5. Click the **Yes** button to delete the item.

Managing Item Defaults

Certain data can be added to each item via the **Item Defaults** section. When a user adds an item with defaults defined to a claim, they are asked if they wish to use the defaults. They can choose not to use the defaults or change them as required.

Default End Date and Review Date Options

When creating the default values for an item, you must select a **Default End Date Method** and a **Default Review Date Method**. The end date and review dates can be set as a **Fixed** date, **Calculated** based on selected criteria or set to **Maximum School Leaving Date**.

The screenshot shows the 'User Defaults' configuration page. At the top, there are navigation tabs: One Home, Applications, Employer, Chaperone, Reports, Batch Processing, Administration, Welcome SYSADMIN, Open New Tab, Help, and Logout. Below these are sub-tabs: CIEE, G&B, Claim Definition, Eligibility Check Link, Manage Agencies, Module Behaviour, User Defaults (selected), Fund Serial Number, and ECS Batch Validation. The main form area contains the following fields and options:

- Default End Date Method:** Radio buttons for Fixed (selected), Calculated, and Maximum School Leaving Date. A date field shows 25/04/2013. A 'Calc Field' dropdown is set to 'Start Date'. An 'Offset (days)' field is empty.
- Default Review Date Method:** Radio buttons for Fixed (selected) and Calculated. A date field shows 25/04/2013. A 'Calc Field' dropdown is set to 'Start Date'. An 'Offset (days)' field is empty.
- Default Fund Code:** A dropdown menu showing 'Default Fund Code'.
- Default Fund:** A dropdown menu showing 'Default Fund'.
- Last Updated By:** SYSADMIN On: 13/02/2017
- Buttons:** Cancel and Save.

If you select a calculated method, you must select a date on which the calculation is based from the **Calc Field**. Then you must enter an **Offset**, which is the number of days after the selected date the item either ends or must be reviewed. For example, to set the default end date to 20 days after the claim start date, select **Start Date** from the **Calc Field** and enter 20 in the **Offset (days)** field.

If you select **Maximum School Leaving Date**, when this item is added to a claim, then the end date for the item claim is automatically set to the last school date for the selected student.

Adding Item Defaults

Item Defaults information is added automatically to a G&B application when the item is selected.

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is selected.
3. Select the item to which you wish to add item default information by selecting the required category then selecting the item.

Setting Up and Administering Grants and Benefits

The screenshot shows the 'Administration' tab in the G&B system. The 'Category Details' section displays the following information:

- Category:** SAM - Documentation test category
- Issue Type:** Multiple
- Is FSM:** No
- Active:** Yes
- Show only Active Categories and Items

Below this information are two tables:

Category Code	Description	Edit	Delete
TRA	Transport	Edit	Delete
GGE	Clothing General	Edit	Delete
DIS	Discretionary	Edit	Delete
SAM	Documentation test c...	Edit	Delete

Item Code	Description	Edit	Delete
SAMES2	A second essential i...	Edit	Delete
SAMESS	An essential item.	Edit	Delete

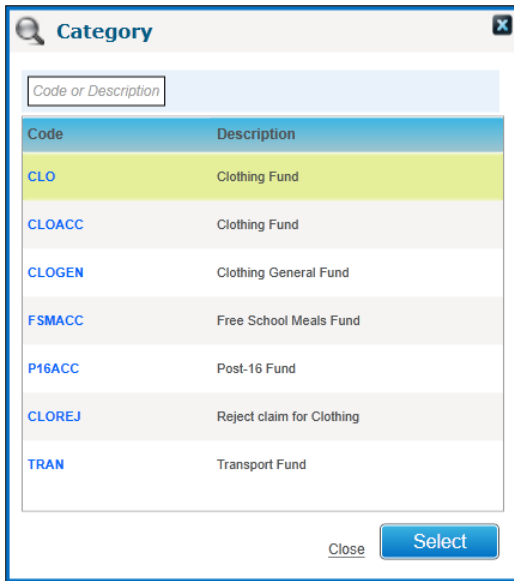
The 'Items Defaults' section below is currently empty, displaying 'No results found'.

- In the **Items Defaults** section, click the **Add** hyperlink to display editable fields relating to item detail.

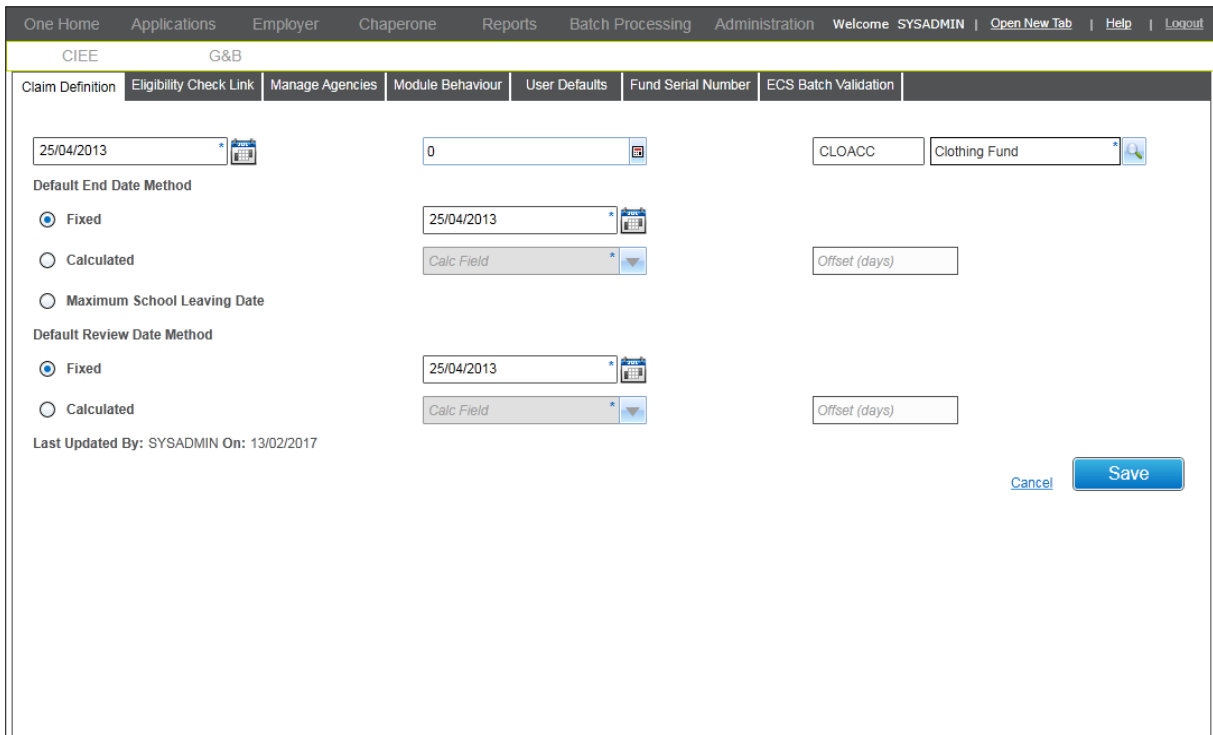
The screenshot shows the 'Items Defaults' form with the following fields and options:

- Default From:** 25/04/2013
- Cost:** 0
- Default Fund:** (Browse button)
- Default End Date Method:**
 - Fixed: 25/04/2013
 - Calculated: Calc Field
 - Maximum School Leaving Date
- Default Review Date Method:**
 - Fixed: 25/04/2013
 - Calculated: Calc Field
- Offset (days):** (Two empty input fields)
- Last Updated By:** SYSADMIN On: 13/02/2017
- Buttons:** Cancel, Save

- If required, select a new **Default From** date.
- Enter a **Default Cost** for the item.
- Click the **Default Fund** browse button to display the **Category** browser.



- Highlight the required fund then click the **Select** button to add the details and close the dialog.



- Select a **Default End Date Method**.

If you selected **Fixed**, you can select a new **Fixed End Date**

If you selected **Calculated**, you must select a **Calc Field** and enter an **Offset**. For more information, see [Default End Date and Review Date Options](#) on page 11.

- Select a **Default Review Date Method**.

If you selected **Fixed**, enter a **Fixed Review Date**.

If you selected **Calculated**, select a **Calc Field** and enter an **Offset**. For more information, see [Default End Date and Review Date Options](#) on page 11.

- Click the **Save** button.

Editing Item Defaults

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

The screenshot shows the 'Administration' section of the 'G&B' page. The 'Claim Definition' tab is active. The 'Category Details' section shows 'Category : CLO - Clothing Grants', 'Issue Type: Single', 'Is FSM: No', and 'Active : Yes'. A checkbox 'Show only Active Categories and Items' is checked. Below this is a table of categories:

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

The 'Items in Category' section shows 'Item : CLOGEN - General Clothing Grant' and 'Active: Yes'. Below this is a table of items:

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

The 'Items Defaults' section shows a table of defaults:

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, highlight the category for the item you wish to edit to display a list of items in the **Items in Category** area.
If the category or item is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.
4. In the **Items in Category** area, highlight the required item to display the associated defaults in the **Items Defaults** area.
5. Click the **Edit** hyperlink for item default you wish to edit.

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number ECS Batch Validation

18/11/1999 65 CLOACC Clothing Fund

Default End Date Method

Fixed Calculated Maximum School Leaving Date

Fixed End Date (dd/mm/yyyy) Start Date 335

Default Review Date Method

Fixed Calculated

Fixed Review Date (dd/mm/yy) Start Date 365

Last Updated By: SYSADMIN On: 13/02/2017

Cancel Save

6. Make the required changes.
7. Click the **Save** button.

Deleting Item Defaults

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

One Home Applications Chaperone Reports Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number

Category Details + Add Items in Category + Add

Category : CLO - Clothing Grants Item : CLOGEN - General Clothing Grant

Issue Type: Single Is FSM: No Active: Yes

Active : Yes

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Items Defaults + Add

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, highlight the category for the item you wish to edit to display a list of items in the **Items in Category** area.

If the category or item is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. In the **Items in Category** area, highlight the required item to display the associated defaults in the **Items Defaults** area.
5. For the items default you wish to delete, click the **Delete** hyperlink to display the **Maintain Claim Item Default** dialog.
6. Click the **Yes** button to delete the item default.

Setting Active Status for Categories and Items

Claim categories and items have an **Active** check box, which is selected by default when they are created. If the **Active** check box is selected for a category or item, users can select the category/item when creating a claim. However, if the **Active** check box is deselected, users cannot select the category or item when making a claim.

If you make an entire category inactive, none of the items associated with the category are available to add to a claim. However, you can make an item inactive without making the entire category inactive.

Setting the Active Status for a Category

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

The screenshot shows the 'Administration' section of the system, specifically the 'G&B' (Grants and Benefits) page. The 'Claim Definition' tab is active. The 'Category Details' section shows the following information:

- Category : CLO - Clothing Grants
- Issue Type: Single
- Is FSM: No
- Active : Yes
- Show only Active Categories and Items

The 'Items in Category' section shows a table with the following data:

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

The 'Items Defaults' section shows a table with the following data:

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, click the **Edit** hyperlink for the category you wish to make active or inactive.

If the category is already inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

Category Details + Add

Category: CLO Clothing Grants

Issue Type: Single Multiple Is FSM

Active

[Cancel](#) [Save](#)

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

4. Select or deselect the **Active** check box as required.
5. Click the **Save** button.

Setting the Active Status for an Item

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

One Home Applications Chaperone Reports **Administration** Welcome SYSADMIN | [Help](#) | [Logout](#)

CIEE **G&B**

Category Details + Add

Category : CLO - Clothing Grants

Issue Type: Single Is FSM: No

Active : Yes

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Items Defaults + Add

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, highlight the category for the item you wish to edit to display a list of items in the **Items in Category** area.

If the category or item is already inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. Click the **Edit** hyperlink for item you wish to make active or inactive.

Category Details + Add

Category : CLO - Clothing Grants
 Issue Type: Single Is FSM: No
 Active : Yes Active

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Items in Category + Add

CLO GEN General Clothing Grant

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

5. Select or deselect the **Active** check box as required.
6. Click the **Save** button.

Adding an Eligibility Check Link

The **Eligibility Check Link** tab enables you to link a specific benefit to a claim category. After a link is created, when a parent/carer makes a new claim, One checks the entries in the **Department Work Pensions And eligibility Check** tab to verify that they receive the benefits required to qualify for a claim in the specified category. If the required benefit claim is not entered in the **Department Work Pensions And eligibility Check** tab, the application cannot be saved with a **Status of Authorised**; it must be saved as either **Pending** or **Rejected**.

IMPORTANT NOTE: For eligibility check linking to work, you must also select the **DSS Checking Active** check box in the **Administration | G&B | Module Behaviour** tab. For more information, see [Module Behaviour Options](#) on page 23.

The following graphic displays a list of existing links for a sample site:

Claim Category	Description	Benefit	Description	Valid From	Valid To	Updated By	Updated Date	Edit	Delete
FSM	Free School Meals	CTC	Child Tax Credit	1/4/2003	31/3/2004	JULIES	08/05/2003	Edit	Delete
FSM	Free School Meals	IS	Income Support	7/1/2000	28/4/2007	PHILJ	24/01/2006	Edit	Delete
FSM	Free School Meals	AS	Asylum Seeker	1/1/2000	31/12/2007	PHILJ	24/01/2006	Edit	Delete
FSM	Free School Meals	JSAIB	Job Seeker Allow-I.	1/1/2000	31/12/2007	PHILJ	24/01/2006	Edit	Delete

The **Claim Category** column displays which categories have links to required benefits, and the **Benefit** column displays the actual name of the required benefit. A **Claim Category** can have multiple required benefits, but each link must be created separately.

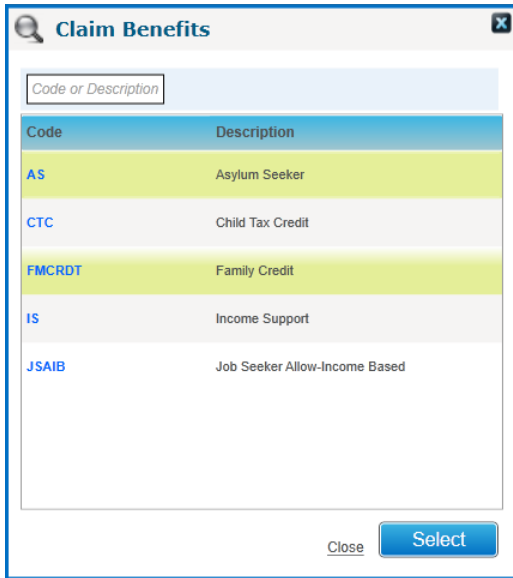
1. Select the **Administration** area and select the **G&B** page.
2. Select the **Eligibility Check Link** tab.

Claim Category	Description	Benefit	Description	Valid From	Valid To	Updated By	Updated Date	
FSM	Free School Meals	CTC	Child Tax Credit	1/4/2003	31/3/2004	JULIES	08/05/2003	Edit Delete
FSM	Free School Meals	IS	Income Support	7/1/2000	28/4/2007	PHILJ	24/01/2006	Edit Delete
FSM	Free School Meals	AS	Asylum Seeker	1/1/2000	31/12/2007	PHILJ	24/01/2006	Edit Delete
FSM	Free School Meals	JSAIB	Job Seeker Allow-I.	1/1/2000	31/12/2007	PHILJ	24/01/2006	Edit Delete

- Click the **Add** hyperlink to display editable fields relating to **Check Link Detail**.

- Click the **Claim Category** browse button to display the **Claim Category** browse.

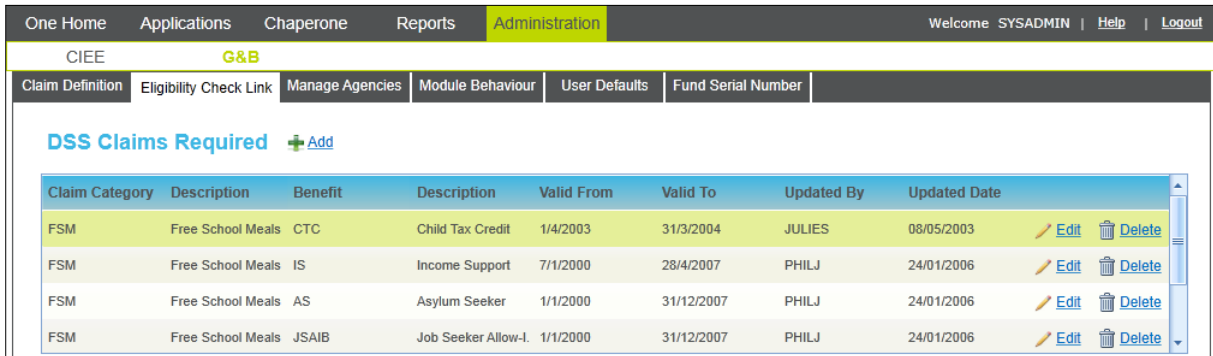
- Highlight the required category and click the **Select** button to add it to the **Check Link Details**.
- Click the **Benefit Required** browse button to display the **Claim Benefits** browser.



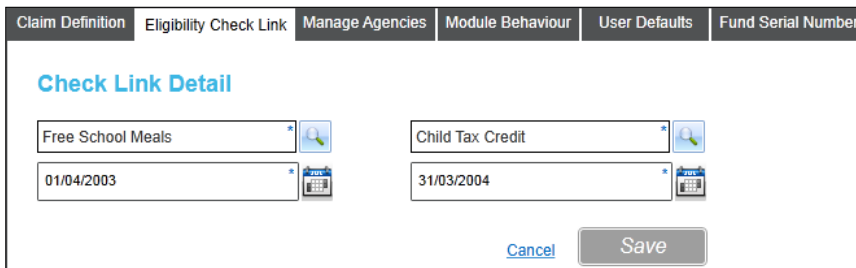
7. Highlight the benefit that the applicant must be in receipt of in order to make the claim.
8. Click the **Select** button to add the benefit to the **Check Link Details**.
9. Select a **Valid From** and **Valid To** date.
10. Click the **Save** button to create the link between the selected category and benefit.

Editing an Eligibility Check Link

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Eligibility Check Link** tab.



3. For the link you wish to update, click the **Edit** hyperlink to enable editing.



4. Make the required changes.
5. Click the **Save** button.

Deleting an Eligibility Check Link

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Eligibility Check Link** tab.

Claim Category	Description	Benefit	Description	Valid From	Valid To	Updated By	Updated Date		
FSM	Free School Meals	CTC	Child Tax Credit	1/4/2003	31/3/2004	JULIES	08/05/2003	Edit	Delete
FSM	Free School Meals	IS	Income Support	7/1/2000	28/4/2007	PHILJ	24/01/2006	Edit	Delete
FSM	Free School Meals	AS	Asylum Seeker	1/1/2000	31/12/2007	PHILJ	24/01/2006	Edit	Delete
FSM	Free School Meals	JSAIB	Job Seeker Allow-I.	1/1/2000	31/12/2007	PHILJ	24/01/2006	Edit	Delete

3. For the link you wish to delete, click the **Delete** hyperlink to display the **Delete Eligibility Check Link** dialog.
4. Click the **Yes** button to delete the link.

Managing Agencies

Agencies are social service entities that can be associated with an application as well as stores to which payments can be made. In One v4 Online, agencies are maintained via the **Manage Agencies** tab.

When a new agency is added, it is automatically added to the correct lookup, based on the **Agency Type**. The following table summarises where each **Agency Type** is used in One v4 Online.

Agency Type	Used In
DSS	DWP Office drop-down list in the Claim Details section of an application's Basic Details tab.
Shop/Store	Select a Shop/Store dialog, accessed when recording details in the Payments tab.
Social Services	Social Services drop-down list in the Claim Details section of an application's Basic Details tab.

Adding an Agency

NOTE: After an agency is added, it cannot be deleted.

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Manage Agencies** tab.

Setting Up and Administering Grants and Benefits

One Home Applications Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number

Agencies [+ Add](#)

Name: BHS - British Home Stores Address: Agency Code: BHS Agency Type: Shop/Store Contact Name: Mrs H Anderson Phone: 01234 684090
 Fax Number: 01234 487290 Email: BHS@Bedford.co.uk

Agency Name	Agency Code	Agency Type	
BHS - British Home Stores	BHS	Shop/Store	Edit
Department for Work & Pensions Bedford	DWPB	DSS	Edit
Marks & Spencer	MS	Shop/Store	Edit
Social Services (Bedford)	SSB	Social Services	Edit

- Click the **Add** button to display editable fields relating to the agency details.

Agencies [+ Add](#)

Name

Select Current Address [Clear Address](#)

Agency Code Agency Type

Contact Name Phone

Fax Number Email

[Cancel](#) [Save](#)

- Enter a **Name**.
- Select an **Address**.
- Enter a unique **Agency Code**.

NOTE: After saving an agency for the first time, the **Agency Code** cannot be changed.

- Select an **Agency Type**.
- If required, enter any other optional information.
- Click the **Save** button to record the agency details and add the new agency to the list.

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number

Agencies [+ Add](#)

Name: BHS - British Home Stores Address: Agency Code: BHS Agency Type: Shop/Store Contact Name: Mrs H Anderson Phone: 01234 684090
 Fax Number: 01234 487290 Email: BHS@Bedford.co.uk

Agency Name	Agency Code	Agency Type	
BHS - British Home Stores	BHS	Shop/Store	Edit
Department for Work & Pensions Bedford	DWPB	DSS	Edit
Marks & Spencer	MS	Shop/Store	Edit
Social Services (Bedford)	SSB	Social Services	Edit
The Chemist	999	Shop/Store	Edit

Editing Agency Details

If required, most agency details can be edited. However, the **Agency Code** that was assigned when the agency was first added cannot be changed.

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Manage Agencies** tab.
3. For the agency you wish to edit, click the **Edit** hyperlink to enable editing.
4. Make the required changes.
5. Click the **Save** button.

Module Behaviour Options

The **Module Behaviour** tab is used to administer the validations throughout the G&B area as well as enter details to enable users to perform checks via the DfE’s Eligibility Checking System (ECS).

There are two sets of options that can be edited; the **Module Behaviour** settings and the **ECS Override Settings**. For most Local Authorities, the **ECS Override Settings** will never be used and should be edited only when instructed by Capita to do so. The following table describes the options in this tab.

Option	Description
Module Behaviour	
NI Number required on Parent/Carer Claims	If this box is selected, for any new parent/carers claims, the National Insurance (NI) number will be mandatory in all fields requesting the number. An application cannot be saved if National Insurance field is blank. NOTE: If adding a claim to an asylum seeker guardian (as recorded in the Person Basic Details tab), this option is ignored as no NI is required.
DSS Checking Active	All new claims made require the guardian to have the appropriate benefit recorded, as indicated by the eligibility check. For more information, see Adding an Eligibility Check Link on page 18.
Base Open Days	The number of days the school is open for students each year. This number is used when calculating the cost of a Free School Meals claim.
ECS Environment	Live – Select this to connect to the production ECS environment provided by the DWP. This should be selected after testing your environment in the ECS sandpit environment. Sandpit – Select this to connect to the development ECS environment provided by the DWP. This environment can identify connectivity issues with the DWP ECS service before going live. Mock – This is for Capita testing purposes <u>only</u> . Do not attempt to use this environment.
ECS Local Authority	The name of the LA as provided by the DWP.
ECS Username	Username provided to the LA to access the ECS. This is provided by the DWP.
ECS Password	Password to accompany the ECS username. This is provided by the DWP.
ECS Override Settings	

Option	Description
ECS Service URI Override	<u>Leave blank</u> unless instructed to do so by Capita.
ECS Service Version Override	<u>Leave blank</u> unless instructed to do so by Capita.

ECS Validation Firewall Access

The G&B ECS batch validation check now calls the external DfE website from the integration server. Previously, this check called from the One web server. In order to communicate with the DfE ECS, you must ensure that any firewalls in your One environment allow access to the following DfE URLs:

DfE Environment Type	URL
Prototype	https://fsm2.education.gov.uk/webservices/prototype/20160901/OnlineQueryService.svc
Sandpit	https://fsm2.education.gov.uk/webservices/Sandpit/20160901/OnlineQueryService.svc
Accreditation	https://fsm2.education.gov.uk/webservices/Accreditation/20160901/OnlineQueryService.svc
Production	https://fsm.education.gov.uk/fsm.lawebbservice/20160901/OnlineQueryService.svcxcv\sdv
Production (for systems that connect via GSI/PSN)	https://fsm.education.gsi.gov.uk/fsm.lawebbservice/20160901/OnlineQueryService.svc

Editing the Module Behaviour Options

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Module Behaviour** tab.

The screenshot shows the G&B Administration interface. The top navigation bar includes 'One Home', 'Applications', 'Employer', 'Chaperone', 'Reports', 'Batch Processing', and 'Administration' (highlighted). Below this, the 'G&B' section is active, with sub-tabs for 'Claim Definition', 'Eligibility Check Link', 'Manage Agencies', 'Module Behaviour' (selected), 'User Defaults', 'Fund Serial Number', and 'ECS Batch Validation'. The 'Module Behaviour' page displays several settings:

- NI Number required on Parent/Carer Claims : Yes
- DSS Checking Active : Yes
- Base Open Days : 190
- ECS Environment : Live
- ECS Local Authority :
- ECS Username :
- ECS Password : Update ECS Password

Below these settings is the 'ECS Override Settings' section, which includes a note: 'These "Override" Settings will normally be empty. They should only be set after guidance from CAPITA'. It lists 'ECS Service URI Override' and 'ECS Service Version Override'.

3. Click the **Edit** hyperlink to enable editing.

4. Make the required changes to the options.
5. Click the **Save** button.

Understanding the User Defaults Options

The **User Defaults** tab enables you to set the defaults to be used when a new claim is created. Setting the appropriate defaults enables the rapid entry of claims. Values set in this tab automatically populate the relevant, required fields in a claim. Once added to an application, the default entries can be edited by the end user.

The following table describes the options in this tab.

Option	Description
Use Defaults on New Claim Records	If selected, all new claims will use the default values defined elsewhere in this tab.
Defaults Change Based on Last Claim Entry	If selected, when a new claim is created using a different value than the default value entered in this tab, the value in this tab is changed to reflect the value used in the most recent application.
Claim Item	The default Claim Item for all new claims.
Claim Status	The default Claim Status for all new claims.
Area Office	The default Area Office for all new claims.
Authorising Officer	The default Authorising Officer for all new claims.

Editing the User Defaults Options

1. Select the **Administration** area and select the **G&B** page.

2. Select the **User Defaults** tab.

The screenshot shows the 'User Defaults' tab selected in the 'G&B' administration interface. The page title is 'User Defaults' with an 'Edit' link. The settings are as follows:

Use Defaults on New Claim Records	: Yes
Defaults Change Based on Last Claim Entry	: Yes
Claim Item	: P16BKS - Post-16 Book Grant
Claim Status	: CURR - Current
Area Office	:
Authorising Officer	: SL - Simon Langton

3. Click the **Edit** hyperlink to enable editing.

The screenshot shows the 'User Defaults' tab in edit mode. The settings are now interactive:

- Use Defaults on New Claim Records
- Defaults Change Based on Last Claim Entry
- Claim Item: P16BKS - Post-16 Book Grant
- Claim Status: CURR - Current
- Area Office: (empty)
- Authorising Officer: SL - Simon Langton

Buttons for 'Cancel' and 'Save' are visible at the bottom right.

4. Make the required changes to the options.
5. Click the **Save** button.

Configuring Serial Numbering

Serial numbers enable you to automatically assign a unique number to each claim processed. When configured, One generates a number based on the fund used to process the claim. The serial number consists of the **Prefix** and the **Next Numbers Issue**. The number generated is automatically entered in the **Serial No.** field of a claim when the claim is authorised.

IMPORTANT NOTES: Serial number formats cannot be deleted or edited after they have been created.


In the One v3 version of G&B, serial numbers are reset at the beginning of each year. In the v4 Online version of G&B, there are no years and numbering continues year on year.

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Fund Serial Number** tab.

Fund Code	Description	Prefix	Next Number Issue
CLO	Clothing Fund	CLO	104
CLOGEN	Clothing General Fund	CLO	102
CLOREJ	Reject claim for Clothing	ABC	3
FSMACC	Free School Meals Fund	CCC	5
TRAN	Transport Fund	TRA	9

- Click the **Add** hyperlink to display editable fields relating to the serial number format.

Serial Numbering **Add**

Fund Code* Description* 

Prefix*

Next Number Issue*

[Cancel](#) [Enable](#)

- Click the **Description** browse button to display the **Fund** browser.

Fund

Code or Description

Code	Description
CLOACC	Clothing Fund
P16ACC	Post-16 Fund

[Close](#) [Select](#)

- Highlight the required fund then click the **Select** button to add the fund and close the dialog.
- Enter a unique **Prefix**. This must be three alpha-numeric characters.
- Enter a **Next Number Issue**.
- Click the **Enable** button to display the **Grant and Benefits** dialog.
- Click the **Yes** button to record the number format.

If there are authorised claims recorded against the fund you have selected that do not have serial numbers, a second dialog is displayed. Click the **Yes** button if you want to add serial numbers to existing claims or the **No** button to leave existing authorised claims unchanged.

03 / Creating a New Grants and Benefits Application

Introduction

Grants and Benefits (G&B) applications are created for students seeking funding from the Local Authority. Generally, this funding is in the form of Free School Meals (FSM), but can also cover other funding that may be available from the government and managed by the LA. After an application is approved, the details are incorporated into the relevant areas of One.

Claims with Multiple Dependents

In previous versions of G&B in the v3 Client, the claim application process was parent/carer focused. When creating a claim, you searched for a parent/carer, which also returned a list of any dependents. This parent-centric approach is still available in G&B v4 Online.

However, in G&B v4 Online, claims can also be created in a student-centric manner. Due to the nature of information in the One database, it is more likely that a student record exists in the database than the parent/carer. Therefore, when creating an application, you can first search for a student. You can then associate the student with a parent/carer (either by selecting a parent/carer from the database who is already linked to the student or by adding them as a new parent/carer) and creating the appropriate relationship.

Regardless of who you add first, the parent/carer or student, after completing all the other details of the first application and clicking the **Create Application** button, you are prompted to create applications for other dependents. All students who are already registered as dependents of the parent/carer associated to the claim are listed, but you can also create a new association with a student record that already exists in the One database or add a new student record.

Creating a New Grants and Benefits Application (Student-Centric)

1. From within **Applications** area, select the **G&B** page.

Creating a New Grants and Benefits Application

One Home Applications Employer Chaperone Reports Batch Processing Administrati Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

Applications + Add New Application

Student Name Parent/Carer Name Student DOB: (dd/mm/yyyy)

Start Date: (dd/mm) End Date: (dd/mm)

More Options Search by Student Clear Search Search

Student Name	Parent/Carer	Start Date	End Date	Claim Stat	Student Address	Student DOB	Student NCY	Carer NI Number	Carer DOB	Fund Type	Status
--------------	--------------	------------	----------	------------	-----------------	-------------	-------------	-----------------	-----------	-----------	--------

- Click the **Add New Application** hyperlink to display the **Create New G&B Application** page.

One Home Applications Employer Chaperone Reports Batch Processing Administrati Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

Create New G&B Application

Student Name Person Name

+ Add New Student ECS Validation

View Student Details

DOB : NI Number : - Asylum Seeker : No
 NCY : Address : NASS Number :
 Registered Base : Parent/Carer Contact Number :
 Address :
 Student Contact Number :

Claim Details

FSM Primary Free School Meals Fund CURR - Current
 SAEO - Southern Area Edt. DG - DWP Social Services
 DWP Office
 02/10/2017 21/07/2001 Portal Reference:
 21/07/2001
 1.3 Calculated Cost: Serial Number

Authorisation Details

Status Authorised Date: (dd/mm) Last Updated On: Last Updated By:
 Cancel Create Application

- Click the **Student Name** browse button to display the **Select Student** browser.

Student Name	Attendance	Chosen Name	Given Name	Middle Name	UPN	Base Name	Student Id	DoB	Address	Postcode	NCY
--------------	------------	-------------	------------	-------------	-----	-----------	------------	-----	---------	----------	-----

- Enter your search criteria then click the **Search** button to display a list of students who match the entered search criteria.

QBE Limit of 200 reached. First 200 students returned matching "s...", Active People".

Student Name	Attendance	Chosen Name	Given Name	Middle Name	UPN	Base Name	Student Id	DoB	Address
<input type="checkbox"/> A Sa	Attendance	A Se	S Cr	Br			9	1	6 74
<input type="checkbox"/> A R	Attendance	A , F	R Sc	AP			9	1	0 4 M
<input type="checkbox"/> A Ds	Attendance	A D	D Sc	Or			9	2	0 53
<input type="checkbox"/> A Ss	Attendance	A S	S At	AP			9	0	9 49 I
<input type="checkbox"/> A Ss	Attendance	A S	S Can	IT			9	1	0 11 I
<input checked="" type="checkbox"/> A Ss	Attendance	A S	S Et	AP			9	1	0 52 I
<input type="checkbox"/> A Ss	Attendance	A S	S Ju	TC			9	1	1 5 M
<input type="checkbox"/> A Ss	Attendance	A S	S M	Ne			9	2	9 69 I
<input type="checkbox"/> A Ss	Attendance	A S	S Er				9	2	5 50 I
<input type="checkbox"/> A Sc	Attendance	A S	S In				9	0	7 36 I
<input type="checkbox"/> A Tr	Attendance	A T	T Sc	W			9	2	4 59 I
<input type="checkbox"/> A S	Attendance	A k	S	At			8	0	5

If the student is not already recorded in One, you can add them. For more information, see [Adding a New Student to the One Database](#) on page 43.

- Select the check box for the student you wish to add to the claim application then click the **Select** button to add the student to the application and close the browser.

After adding a student, the fields in the **Claim Details** section become editable. If any fields have defaults defined, they are populated.

Creating a New Grants and Benefits Application

6. If a parent or carer is required for the application:
 - a. Click the **Parent/Carer Name** browse button to display the **Select a Parent/Carer** dialog.
 - b. Enter your search criteria then click the **Search** button to display a list of parents/carers who match the entered search criteria

If the parent/carers is not already recorded in One, you can add them. For more information, see [Adding a New Parent/Carer to the One Database](#) on page 43.
 - c. Select the check box for the required parent/carers then click the **Select** button to add them to the application and close the browser.
7. In the **Claim Details** section, click the **Claim Item** browse button to display the **Select Claim Code** dialog.

Category Code	Description	Item Code	Description
CLO	Clothing Grants	CLOGEN	General Clothing Grant
FSM	Free School Meals	FSMGEN	General Free School Meal
FSM	Free School Meals	FSMPRI	FSM Primary
P16	Post-16 Grants	P16BKS	Post-16 Book Grant
P16	Post-16 Grants	P16CLO	Post-16 Clothing Grant
P16	Post-16 Grants	P16TRL	Post-16 Travel Grant
REJ	Rejected Claims	REJCLO	Reject Clothing Claim
TRA	Transport	TRAFRE	Free Transport Pass
TRA	Transport	TRAIN	Travel In
CGE	Clothing General	CGES1	Shop One

- Highlight the required item then click the **Select** button to add the item to the application and close the dialog.

If the administrator has defined defaults for the item, the **Capita One – Claim Details** confirmation dialog is displayed. If you want to use the defaults, click the **Yes** button. If you do not want to use the item defaults, click the **No** button.

- To add or change the **Fund**, click the adjacent browse button to display the **Fund** dialog.

The screenshot shows a dialog box titled "Fund" with a search bar and a table of fund options. The table has two columns: "Code" and "Description".

Code	Description
CLO	Clothing Fund
CLOACC	Clothing Fund
CLOGEN	Clothing General Fund
FSMAcc	Free School Meals Fund
P16ACC	Post-16 Fund
CLOREJ	Reject claim for Clothing
TRAN	Transport Fund

At the bottom of the dialog, there are "Close" and "Select" buttons.

- Highlight the required fund then click the **Select** button to add it to the application and close the browser.

The screenshot shows the "Claim Details" form. It includes several dropdown menus and text input fields:

- General Free School Meal (dropdown)
- Free School Meals Fund (dropdown)
- CURR - Current (dropdown)
- SAEO - Southern Area Ed. (dropdown)
- DG - D (dropdown)
- Social Services (dropdown)
- DWP Office (dropdown)
- 02/10/2017 (date field)
- 12/12/2014 (date field)
- Portal Reference: 08/05/2014 (date field)
- 0 (text input)
- Calculated Cost: (text input)
- Serial Number (text input)
- Authorisation Details section with Status (dropdown) and Authorised Date: 02/10/2017 (date field)
- Last Updated On: (text input)
- Last Updated By: (text input)
- Buttons: Cancel, Create Application

- Select the required **Received Date**, **Start Date** and **End Date**.
- Select or enter any other optional claim information.

NOTE: If your One administrator has configured a serial number for the item, you cannot enter a **Serial Number**. The number is created automatically when the claim is authorised.

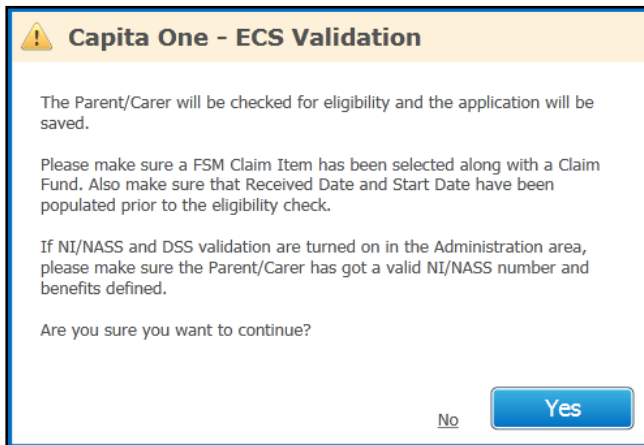
- In the **Authorisation Details** section, select the required **Status**.

This screenshot is identical to the previous one, but the "Authorisation Details" section is updated:

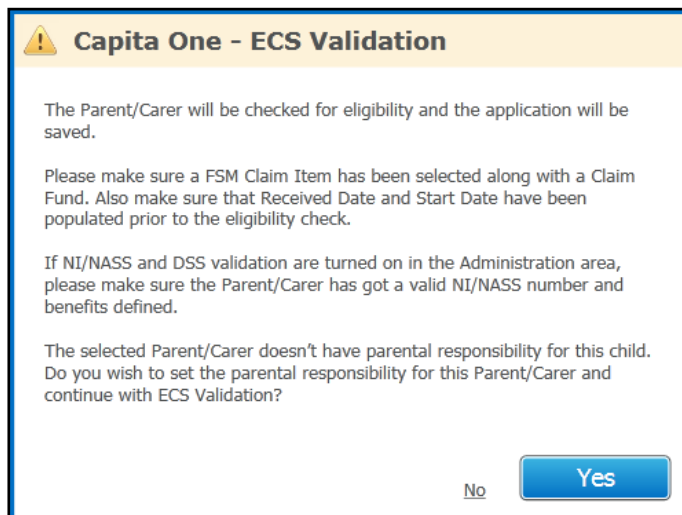
- Status is set to "Authorised" (dropdown)
- Authorised Date is 02/10/2017 (date field)
- Last Updated By is SYSADMIN (text input)
- The "Create Application" button is now highlighted in blue.

Creating a New Grants and Benefits Application

14. If required, click the **ECS Validation** to check the parent/carer's FSM eligibility. A confirmation dialog is displayed. If you do not need to run a check, skip to step 17.

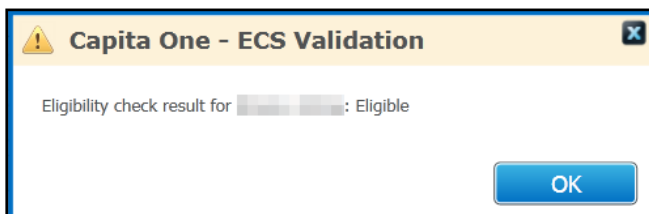


IMPORTANT NOTE: If you attempt an ECS validation and the selected parent/carer does not currently have parental responsibility designated in One, you are presented with the following confirmation dialog.



If you click the **Yes** button, One automatically assigns the parent/carer parental responsibility and performs the check. If you do not want to assign parental responsibility to this parent/carer, click the **No** button to cancel the check then add a parent/carer with parental responsibility. Parental responsibility can be changed manually anytime. For more information, see [Updating Parental Responsibility](#) on page 47.

15. Click the **Yes** button to perform the validation. When complete, the **Capita One – ECS Validation** dialog is displayed.



16. Click the **OK** button to close the dialog. If there are no other dependents, the completed application is displayed. If there are other dependents associated with the parent/carer, the **Dependent Details** dialog is displayed and you should skip to step 18.

More Information:

[Checking Free School Meal Eligibility](#) on page 61

- Click the **Create Application** button. If there are additional dependents associated with the parent/carer, the **Dependent Details** dialog is displayed. If there are no other dependents, the saved application is displayed.

<input type="checkbox"/>	Name	Parental Responsibility	Relationship	Date of Birth	Active Claims
<input type="checkbox"/>	[redacted]	Yes	Mother	[redacted]	1
<input type="checkbox"/>	[redacted]	Yes	Mother	[redacted]	1
<input type="checkbox"/>	[redacted]	Yes	Mother	[redacted]	1
<input type="checkbox"/>	[redacted]	Yes	Mother	[redacted]	1

- For each additional dependent who requires an application, select the appropriate check box then click the **Yes** button. A new application is created for each selected dependent.

If required, click the **Add Dependent** button to select another student to add as a dependent. If the student you wish to add does not already exist in the One database, you can add them via the **Add New Student** hyperlink.

Click the **No** button if no additional applications are required.

The saved application details are displayed. If you added other dependents, applications are also created for them.

IMPORTANT NOTE: G&B can be configured to check that a parent/carer is receiving a specific benefit, listed in their **Department Work Pensions And Eligibility Check** tab, in order for their dependents to make a claim in certain categories. If you have just added the parent/carer or their **Department Work Pensions And Eligibility Check** tab has not been updated with all their benefits, you might not be able to save the application with a **Status** of **Authorised**. Instead, you can save the claim with a **Status** of **Pending** then add the required information to the parent/carer's **Department Work Pensions And Eligibility Check** tab, accessible via the **View Parent/Carer Details** hyperlink. For more information, see [Adding Benefit Claims](#) on page 75.

Creating a New Grants and Benefits Application (Parent-Centric)

1. From within the **Applications** area, select the **G&B** page.

The screenshot shows the 'G&B' page within the 'Applications' section of the CIEE system. The page includes a navigation bar with 'Applications' highlighted. Below the navigation bar, there are search filters for 'Student Name', 'Parent/Carer Name', and 'Student DOB: (dd/mm/yyyy)'. There are also date pickers for 'Start Date: (dd/mm)' and 'End Date: (dd/mm)'. A 'Search' button is located to the right of the filters. Below the search filters, there is a table with the following columns: Student Name, Parent/Carer, Start Date, End Date, Claim Stat, Student Address, Student DOB, Student NCY, Carer NI Number, Carer DOB, Fund Type, and Status. The table is currently empty.

2. Click the **Add New Application** hyperlink to display the **Create New G&B Application** page.

The screenshot shows the 'Create New G&B Application' interface. At the top, there are navigation tabs: One Home, Applications, Employer, Chaperone, Reports, Batch Processing, Administrati, Welcome SYSADMIN | Open New Tab | Help | Logout. Below the navigation, the page title is 'CIEE G&B Create New G&B Application'. There are two search boxes: 'Student Name' and 'Person Name'. Below these are 'Add New Student' and 'ECS Validation' buttons. The 'View Student Details' section includes fields for DOB, NI Number, Address, Asylum Seeker, NCY, Registered Base, Parent/Carer Contact Number, Address, and Student Contact Number. The 'Claim Details' section includes dropdowns for FSM Primary, Free School Meals Fund, SAEO, DWP Office, and Social Services, along with date pickers for 02/10/2017, 21/07/2001, and Portal Reference (21/07/2001). There is also a 'Calculated Cost' field and a 'Serial Number' field. The 'Authorisation Details' section includes a 'Status' dropdown, 'Authorised Date' (dd/mm), 'Last Updated On', and 'Last Updated By' fields. A 'Cancel' button and a 'Create Application' button are at the bottom right.

3. Click the **Person Name** browse button to display the **Person Search** browser.

The screenshot shows the 'Person Search' browser. It has a search bar with a magnifying glass icon. Below the search bar are several search criteria fields: 'Title' (dropdown), 'Any' (dropdown), 'Contact Name' (text), 'Role' (dropdown), 'Gender' (dropdown), 'Postcode' (text), and 'Base Name' (text with a magnifying glass icon). There are also checkboxes for 'Include Name History', 'Active', 'Employee Only', and 'Governor Only'. A 'Search' button is on the right. Below the search criteria is a table with columns: Name, Title, Chosen Name, Given Name 2, Person Id, DoB, Address, and Postcode. The table is currently empty. There are 'Add New Person', 'Close', and 'Select' buttons at the bottom.

4. Enter your search criteria then click the **Search** button to display a list of people who match the entered search criteria.

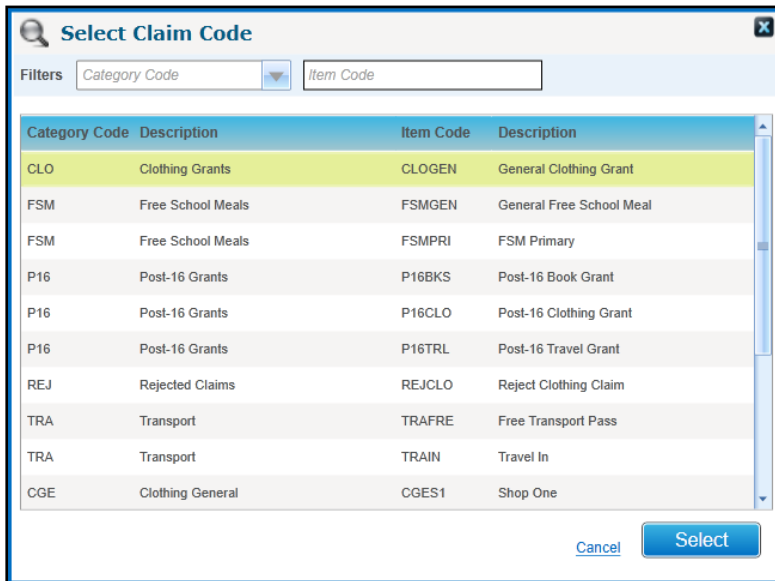
- d. Click the **Save** button.
7. Click the **Dependent** browse button to display the **Dependent Details** browser.



8. Highlight the first dependent for whom you wish to create an application, then click the **Select** button to add them to the application and close the dialog.

If the student is not already recorded in One, click the **Add Dependent** hyperlink to add them. For more information, see [Adding a New Student to the One Database](#) on page 43.

9. In the **Claim Details** section, click the **Claim Item** browse button to display the **Select Claim Code** dialog.



10. Highlight the required item then click the **Select** button to add the item to the application and close the dialog.

If the administrator has defined defaults for the item, the **Capita One – Claim Details** confirmation dialog is displayed. If you wish to use the defaults, click the **Yes** button. If you do not wish to use the item defaults, click the **No** button.

11. To add or change the **Fund**, click the adjacent browse button to display the **Fund** dialog.

Creating a New Grants and Benefits Application

Code	Description
CLO	Clothing Fund
CLOACC	Clothing Fund
CLOGEN	Clothing General Fund
FSMACC	Free School Meals Fund
P16ACC	Post-16 Fund
CLOREJ	Reject claim for Clothing
TRAN	Transport Fund

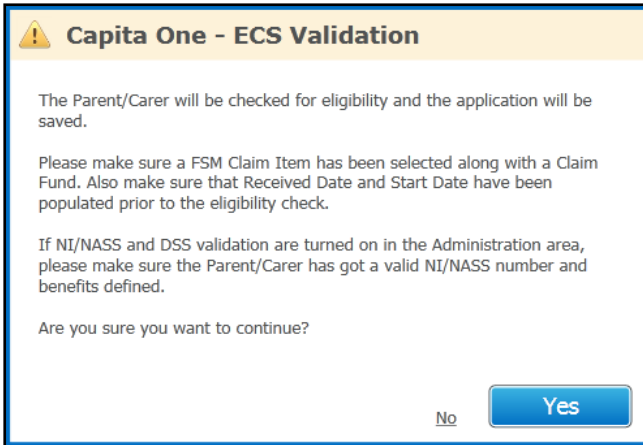
- Highlight the required fund then click the **Select** button to add it to the application and close the browser.

- Select the required **Received Date**, **Start Date** and **End Date**.
- Select or enter any other optional claim information.

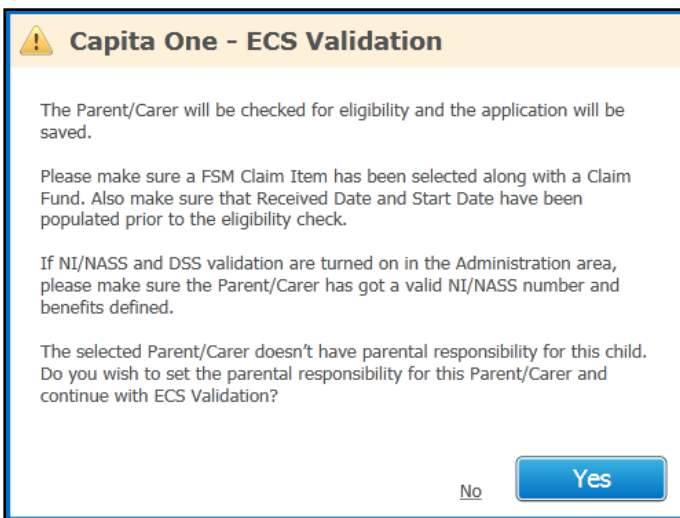
NOTE: If your One administrator has configured a serial number for the item, you cannot enter a **Serial Number**. The number is created automatically when the claim is authorised.

- In the **Authorisation Details** section, select the required **Status**.

- If required, click the **ECS Validation** to check the parent/carer's FSM eligibility. A confirmation dialog is displayed. If you do not need to run a check, skip to step 19.

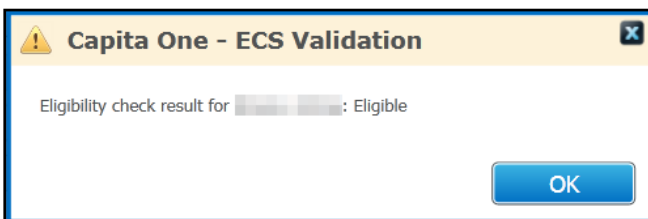


IMPORTANT NOTE: If you attempt an ECS validation and the selected parent/carer does not currently have parental responsibility designated in One, you are presented with the following confirmation dialog.



If you click the **Yes** button, One automatically assigns the parent/carer parental responsibility and performs the check. If you do not want to assign parental responsibility to this parent/carer, click the **No** button to cancel the check then add a parent/carer with parental responsibility. Parental responsibility can be changed manually anytime. For more information, see [Updating Parental Responsibility](#) on page 47.

- Click the **Yes** button to perform the validation. When complete, the **Capita One – ECS Validation** dialog is displayed.



- Click the **OK** button to close the dialog. If there are no other dependents, the completed application is displayed. If there are other dependents associated with the parent/carer, the **Dependent Details** dialog is displayed and you should skip to step 20.
- Click the **Create Application** button to display the **Dependent Details** dialog.

Creating a New Grants and Benefits Application

Do you wish to create a claim for any other dependent(s) of A [redacted], A [redacted] ?

<input type="checkbox"/>	Name	Parental Responsibility	Relationship	Date of Birth	Active Claims
<input type="checkbox"/>	A [redacted]	No	[redacted]	1 [redacted] 0	0
<input type="checkbox"/>	C [redacted]	Yes	[redacted]	1 [redacted] 0	0

[+ Add Dependent](#) No Yes

20. For each additional dependent who requires an application, select the appropriate check box then click the **Yes** button. An application is created for each selected dependent.

If required, click the **Add Dependent** hyperlink to select another student to add as a dependent. If the student you wish to add does not already exist in the One database, you can add them via the **Add New Student** hyperlink.

Click the **No** button if no other applications are required.

The saved application details are displayed. If you added other dependents, applications are also created for them.

IMPORTANT NOTE: G&B can be configured to check that a parent/carer is receiving a specific benefit, listed in their **Department Work Pensions And Eligibility Check** tab, in order for their dependents to make a claim in certain categories. If you have just added the parent/carer or their **Department Work Pensions And Eligibility Check** tab has not been updated with all their benefits, you might not be able to save the application with a **Status of Authorised**. Instead, you can save the claim with a **Status of Pending** then add the required information to the parent/carer's **Department Work Pensions And Eligibility Check** tab, accessible via the **View Parent/Carer Details** hyperlink. For more information, see [Adding Benefit Claims](#) on page 75.

Adding a New Student to the One Database

1. From the **Create New G&B Application** page, click the **Add New Student** hyperlink to display the **Add New Student** dialog.
2. Enter the details for the student. **Forename**, **Surname**, **DOB** and **Gender** are required.
3. Enter any additional details for the student.
4. Click the **Save** button to return to the **Create New G&B Application** page.

Adding a New Parent/Carer to the One Database

1. From the **Create New G&B Application** page, click the **Add New Parent/Carer** hyperlink to display the **Add New Parent/Carer** dialog.
2. Enter the details for the parent/carers. **Forename**, **Surname**, **DOB** and **Gender** are required.
3. Enter any additional details for the parent/carers.
4. Click the **Save** button to return to the **Create New G&B Application** page.

Opening an Existing Application

You can search for applications based on student details, employer name or application specific details.

1. From within the **Applications** area, select the **G&B** page.

The screenshot displays the 'Applications' page for 'G&B' in the CIEE system. The navigation bar includes 'One Home', 'Applications', 'Employer', 'Chaperone', 'Reports', 'Batch Processing', and 'Administration'. The user is logged in as 'SYSADMIN'. The page title is 'CIEE G&B'. Below the title, there is a section for 'Applications' with an 'Add New Application' link. The search interface includes several input fields: 'Student Name', 'Parent/Carer Name', 'Student DOB: (dd/mm/yyyy)', 'Start Date: (dd/mm)', and 'End Date: (dd/mm)'. A 'Search' button is located to the right of these fields. Below the search fields, there is a 'More Options' link and a 'Search by Student' link. A table with the following columns is shown: Student Name, Parent/Carer, Start Date, End Date, Claim Status, Student Address, Student DOB, Student NCY, Carer NI Number, Carer DOB, Fund Type, and Status. The table is currently empty.

2. Enter your search criteria.

To search using more specific student or application details, click the **More Options** hyperlink to display the **More Search Options** dialog.

Creating a New Grants and Benefits Application

More Search Options ✕

Student

Gender Student ID Postcode Base Name 🔍

Parent/Carer

Gender Postcode

Application

Claim Status Authorise Status Portal Reference Number

Clear Search Search

[Close](#)

- Click the **Search** button to display a list of applications that match the entered search criteria.

One Home | **Applications** | Employer | Chaperone | Reports | Batch Processing | Administration | Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

Applications [Add New Application](#)

Student Name brown Student DOB (dd/mm/yyyy) 🔍

Start Date: (dd/mm) _ / _ / _ End Date: (dd/mm) _ / _ / _

More Options [Search by Student](#) Clear Search Search

Student Name	Parent/Carer	Start Date	End Date	Claim Status	Student Address	Student DOB	Student NCY	Carer NI Number	Carer DOB	Fund Type	Status
Br...	Br...	01/02/2017	01/01/2030	Current	6 L Jul	01	0		05	Free School Meals Fund	Authorised
H...	Br...	01/02/2017	01/01/2030	Current	6 L Jul	02	-1		05	Free School Meals Fund	Authorised
W...	Br...	01/02/2017	01/01/2030	Current	6 L Jul	01	-1		05	Free School Meals Fund	Authorised
D...	Br...	16/01/2014	18/10/2014	Current	11 ALC	09	0		23	Reject claim for Clothing	Authorised
F...	Br...	13/01/2014	04/07/2014	Current	16 Ink	29	4		26	Reject claim for Clothing	Authorised
H...	Br...	12/01/2014	01/10/2014	Current	8 V Dr	04	4		30	Reject claim for Clothing	Authorised
U...	Br...	12/01/2014	11/07/2014	Current	8 S ALC	11	10		24	Reject claim for Clothing	Authorised
W...	Br...	12/01/2014	06/08/2014	Current	24 Ad	16	9	Y2464646A	26	Reject claim for Clothing	Authorised
Br...	Br...	11/01/2014	20/07/2014	Current	11 Mar	06	-3		03	Reject claim for Clothing	Authorised
D...	Br...	11/01/2014	06/09/2014	Current	15 Ink	22	12		04	Reject claim for Clothing	Authorised
M...	Br...	09/01/2014	25/06/2014	Current	14 ALC	07	6		16	Reject claim for Clothing	Authorised
C...	Br...	08/01/2014	24/09/2014	Current	18 Ink	29	5		12	Reject claim for Clothing	Authorised
Ch...	Br...	07/01/2014	15/05/2014	Current	4 L ECU	29	8		15	Reject claim for Clothing	Authorised

- Click the required application to display the application details.

Viewing All Applications for a Student

You can quickly view a list of all the applications for a student via the **Search by Student** hyperlink, located on the main G&B **Applications** search page.

- From within the **Applications** area, select the **G&B** page.

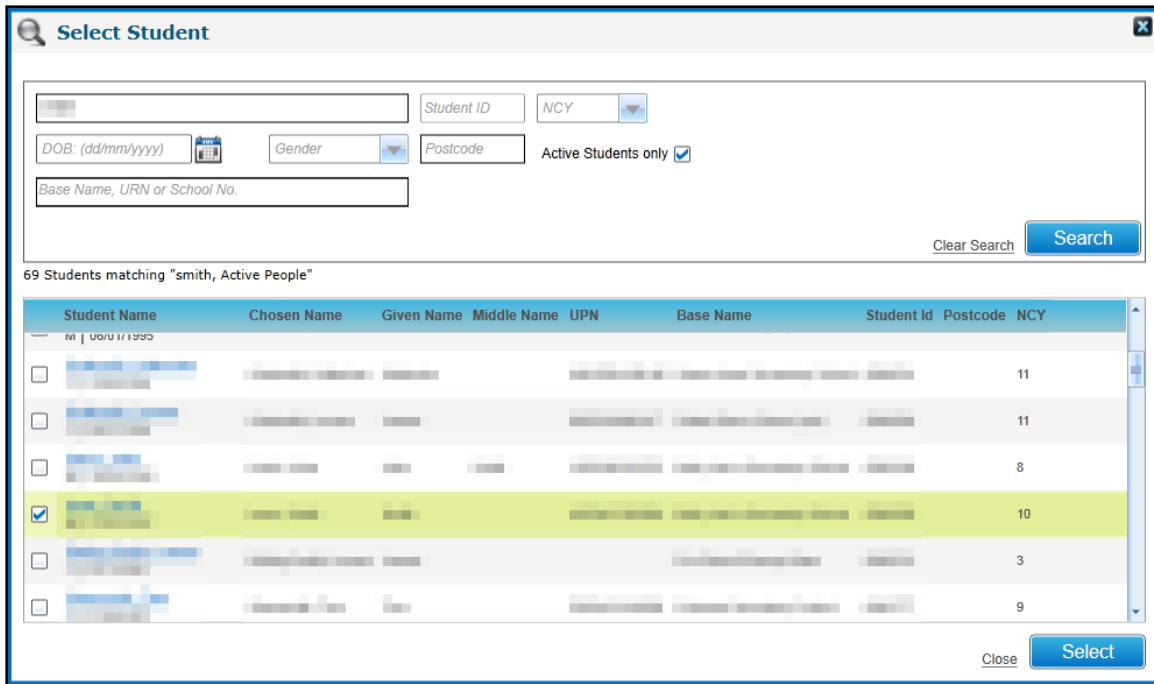
The screenshot shows the main application interface. At the top, there is a navigation bar with tabs: One Home, Applications (highlighted), Employer, Chaperone, Reports, Batch Processing, and Administration. On the right of the navigation bar, it says 'Welcome SYSADMIN | Open New Tab | Help | Logout'. Below the navigation bar, there is a header area with 'CIEE' and 'G&B'. The main content area has a title 'Applications' and a link '+ Add New Application'. There are several search filters: 'Student Name', 'Parent/Carer Name', 'Student DOB: (dd/mm/yyyy)', 'Start Date: (dd/mm)', and 'End Date: (dd/mm)'. There are also 'More Options' and 'Search by Student' links. A 'Search' button is present. Below the filters is a table with the following columns: Student Name, Parent/Carer, Start Date, End Date, Claim Status, Student Address, Student DOB, Student NCY, Carer NI Number, Carer DOB, Fund Type, and Status. The table is currently empty.

2. Click the **Search by Student** hyperlink to display the **Select Student** dialog.

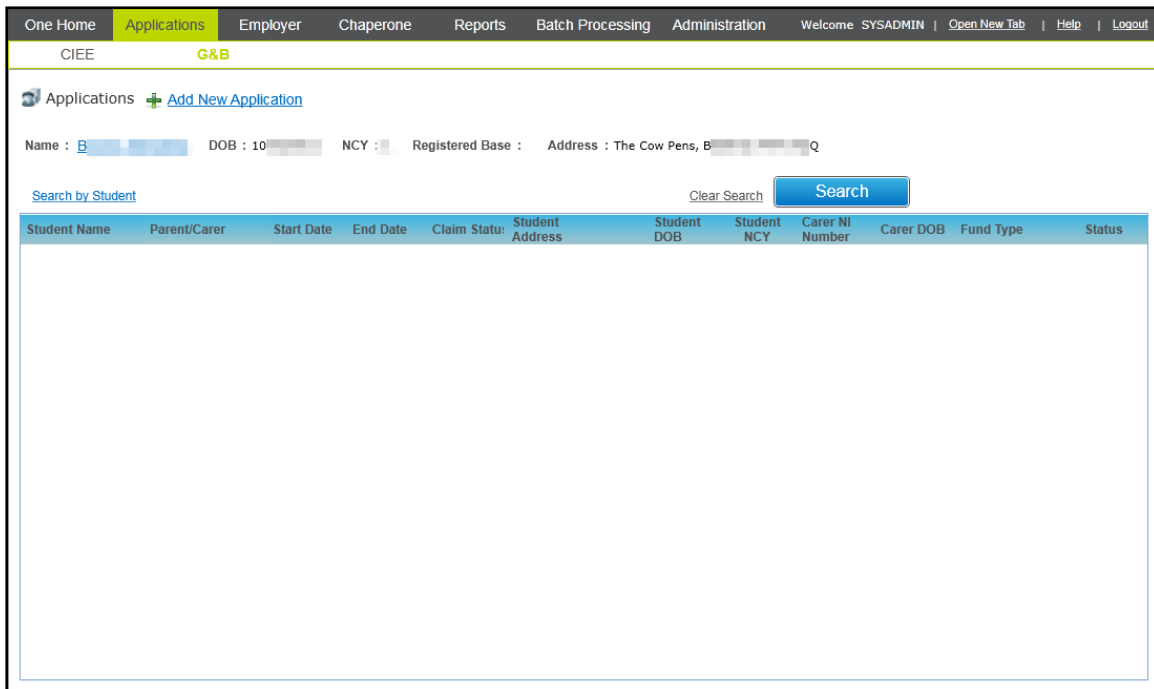
The screenshot shows the 'Select Student' dialog box. It has a title bar with a search icon and the text 'Select Student'. The dialog contains several search filters: 'Student Name or Unique Pupil Number', 'Student ID', 'NCY' (dropdown), 'DOB: (dd/mm/yyyy)', 'Gender' (dropdown), 'Postcode', and 'Active Students only' (checkbox). There is also a 'Base Name, URN or School No.' field. A 'Search' button and a 'Clear Search' link are at the bottom right. Below the filters is a table with the following columns: Student Name, Chosen Name, Given Name, Middle Name, UPN, Base Name, Student Id, Postcode, and NCY. The table is currently empty. At the bottom right of the dialog, there are 'Close' and 'Select' buttons.

3. Enter the required search criteria, then click the **Search** button to display a list of students who match the search criteria.
4. Select the check box for the student whose existing applications you want to view.

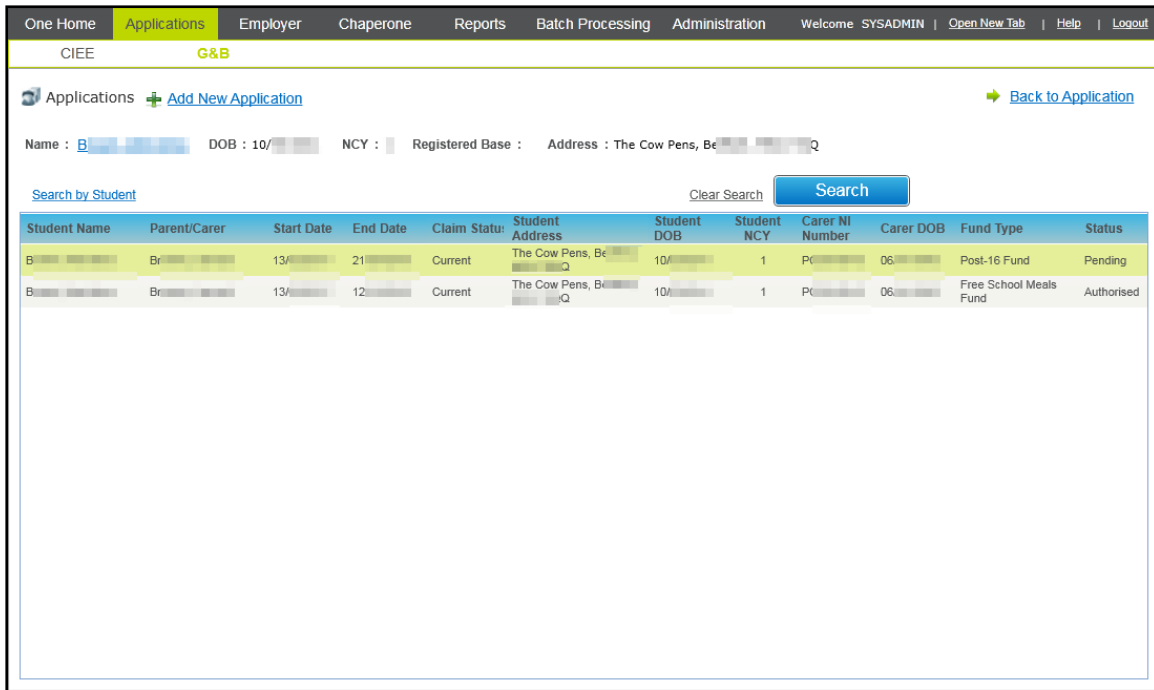
Creating a New Grants and Benefits Application



5. Click the **Select** button to display a summary of the student’s details.



6. Click the **Search** button to display the claims currently associated with the student.



If there is only one application associated with the student, then this application is opened automatically. Otherwise, click on the required application in the list to display the full details.

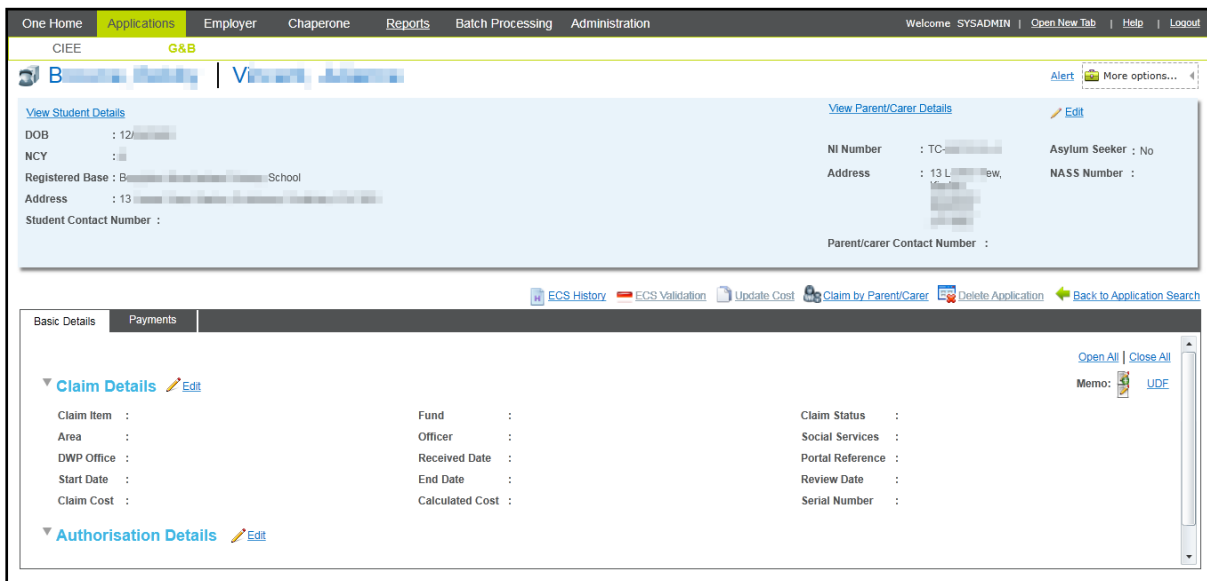
Updating Parental Responsibility

G&B can use the Eligibility Checking Service (ECS) provided by the DfE to check a student's Free Schools Meals (FSM) eligibility instantly. However, the service can only be used if the parent/carer attached to the application has parental responsibility, which is indicated by selecting the **Parental Responsibility** check box.

If required, the **Parental Responsibility** check box can be selected after the application is created.

To update parental responsibility for a student with an existing application:

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 43.



Creating a New Grants and Benefits Application

- Click the **View/Parent/Carer Details** hyperlink to display the parent/carer details.

The screenshot shows the 'Person and Ethnic Details' tab selected. The user information includes: Forename: Julianne, Surname: Vincent, Address: 13 [redacted], Phone: [redacted], Active: Yes, Email: [redacted]. The number of dependants is 2 and the number of claims is 2. The 'Person and Ethnic Details' section shows: Ethnic Origin: -, Home Language: -, Reference: -, Asylum Seeker: No, NASS Number: [redacted], NI Number: TC [redacted], Active: Yes. The 'Impairments' section shows: Registered Disabled: No, Disability Number: -, Day to Day Impairment: -, View Current Disabilities Only: , No Disabilities Recorded, and an 'Add Disabilities' button.

- Select the **Dependants** tab to display a list of dependents.

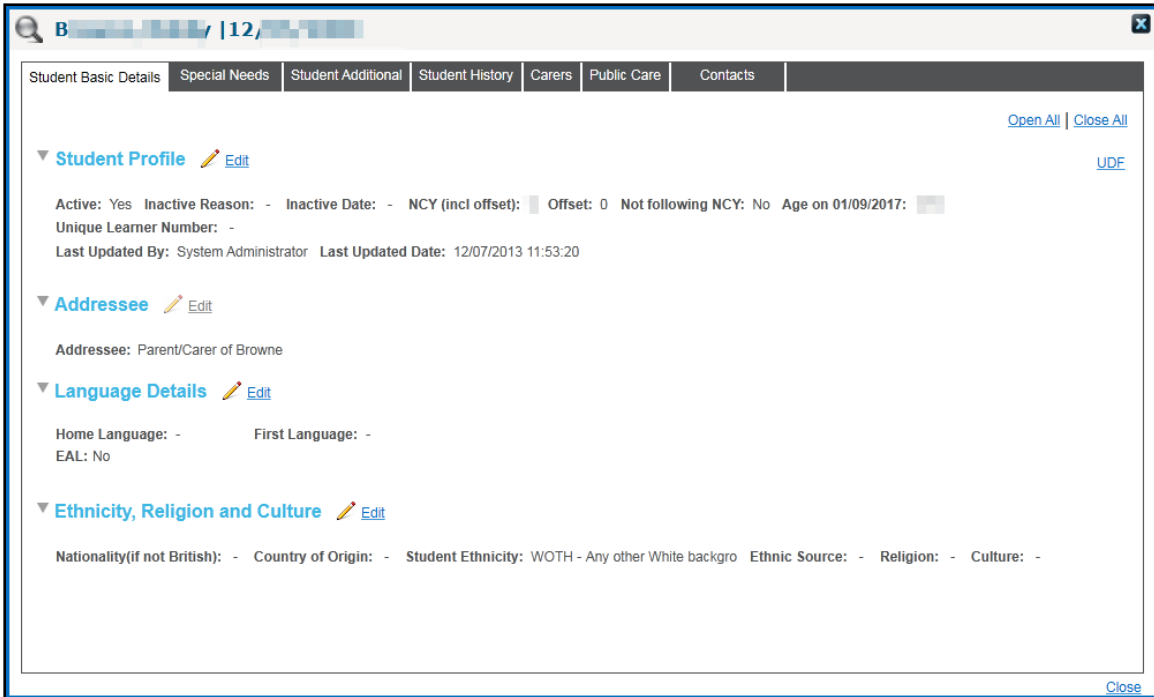
The screenshot shows the 'Dependant Details' tab selected. The student information includes: Student Name: Browne, Bobby, Address: 13 [redacted], Registered Base: B [redacted] School, Parental Responsibility: No, Relationship: Aunt, DOB: 12 [redacted], NCY: [redacted], Age: 16/9, As on: 02/02/2017. A table lists the dependants:

Dependant Name	Parental Responsibility	Relationship To Dependant	Date of Birth
B [redacted]	No	Aunt	12 [redacted]
C [redacted]	Yes	Mother	20 [redacted]

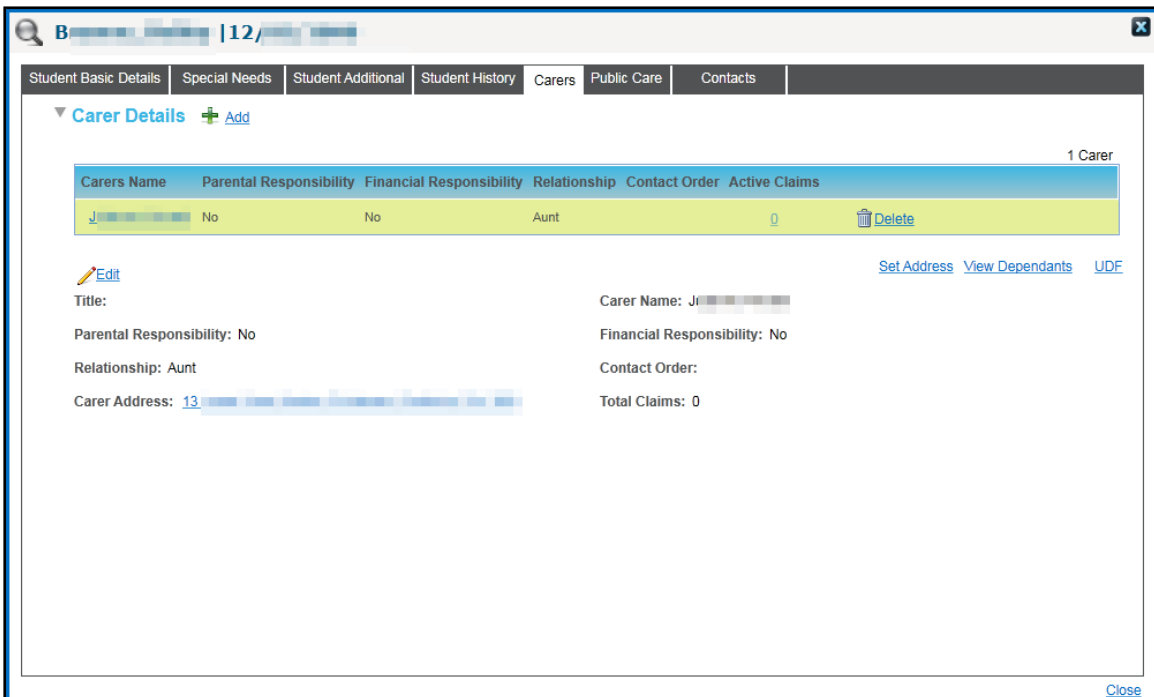
There is a 'Set Address' button at the bottom left.

In this example, the parent/carer does not have parental responsibility for the first dependent listed.

- Click the name of the dependent for whom you want to add parental responsibility. The details of the student are displayed.



5. Select the **Carers** tab.



6. Click the **Edit** hyperlink to enable editing.

Creating a New Grants and Benefits Application

Student Basic Details | Special Needs | Student Additional | Student History | Carers | Public Care | Contacts

▼ Carer Details + Add

1 Carer

Carers Name	Parental Responsibility	Financial Responsibility	Relationship	Contact Order	Active Claims
J	No	No	Aunt	0	Delete

[Edit](#) [Set Address](#) [View Dependants](#) [UDF](#)

Title: Carer Name: J

Parental Responsibility: Financial Responsibility:

Relationship: AUN Contact Order

Carer Address: 13 Total Claims: 0

[Cancel](#) [Save](#)

Close

7. Select the **Parental Responsibility** check box.
8. Click the **Save** button to record the change.

Student Basic Details | Special Needs | Student Additional | Student History | Carers | Public Care | Contacts

▼ Carer Details + Add

1 Carer

Carers Name	Parental Responsibility	Financial Responsibility	Relationship	Contact Order	Active Claims
J	Yes	No	Aunt	0	Delete

[Edit](#) [Set Address](#) [View Dependants](#) [UDF](#)

Title: Carer Name: J

Parental Responsibility: Yes Financial Responsibility: No

Relationship: Aunt Contact Order:

Carer Address: 13 Total Claims: 0

Close

9. Click the **X** button to close the dialog.

If you want to run the ECS check now, click the **Back to Application** hyperlink and run the check.

Editing National Insurance Number and Asylum Seeker Details

To edit the National Insurance number or asylum seeker details for a parent or carer:

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 43.
2. Click the **Edit NINumber / AsylumSeeker** hyperlink to enable editing.
3. Enter the **NI Number**.
4. If required, select the **Asylum Seeker** check box.
5. Click the **Save** button.

Editing Claim Details

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 43.

The screenshot shows a web application interface with a navigation bar at the top containing 'One Home', 'Applications', 'Employer', 'Chaperone', 'Reports', 'Batch Processing', 'Adm', 'Welcome SYSADMIN', 'Open New Tab', 'Help', and 'Logout'. Below the navigation bar, there are tabs for 'CIEE' and 'G&B'. The main content area displays 'View Student Details' with fields for DOB, NCY, Registered Base, Address, and Student Contact Number. To the right, there are fields for 'NI Number', 'Address', and 'Parent/carer'. Below this, there are several action buttons: 'ECS History', 'ECS Validation', 'Update Cost', 'Claim by Parent/Carer', 'Delete Application', and 'Back to Application Search'. The 'Basic Details' tab is active, showing 'Claim Details' and 'Authorisation Details' sections. The 'Claim Details' section contains a grid of fields: Claim Item (Shop One), Fund (Reject claim for Clothing), Claim Status (Current), Area, Officer (S...), Social Services, DWP Office, Received Date (17/01/2014), Portal Reference, Start Date (13/01/2014), End Date (09/07/2014), Review Date (24/01/2014), Claim Cost, Calculated Cost, and Serial Number. There are 'Open All' and 'Close All' buttons on the right side of the 'Claim Details' section.

2. Click the **Edit** hyperlink for the **Claim Details** section to display editable fields relating to the application details.

This screenshot shows the 'Claim Details' section in an edit mode. The fields are now input boxes with dropdown menus and date pickers. The 'Claim Item' is 'Shop One', 'Fund' is 'Reject claim for Clothing', 'Claim Status' is 'CURR - Current', 'Area' is 'Area', 'Officer' is 'SS - Simon Staffurth', 'Social Services' is 'Social Services', 'DWP Office' is 'DWP Office', 'Received Date' is '17/01/2014', 'Portal Reference' is 'Portal Reference:', 'Start Date' is '13/01/2014', 'End Date' is '09/07/2014', 'Review Date' is '24/01/2014', 'Claim Cost' is '0', 'Calculated Cost' is 'Calculated Cost:', and 'Serial Number' is 'Serial Number'. There are 'Open All' and 'Close All' buttons at the top right. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. Make the required changes to the application details.
4. Click the **Save** button.

Editing Authorisation Status

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 43.

The screenshot shows a web application interface with a navigation bar at the top containing 'One Home', 'Applications', 'Employer', 'Chaperone', 'Reports', 'Batch Processing', 'Adm', 'Welcome', 'SYSADMIN', 'Open New Tab', 'Help', and 'Logout'. Below the navigation bar, there is a header area with 'CIEE' and 'G&B'. The main content area is divided into two sections. The top section, titled 'View Student Details', shows fields for 'DOB', 'NCY', 'Registered Base', 'Address', and 'Student Contact Number'. The bottom section, titled 'Basic Details', contains a table of claim information:

Claim Item	: Shop One	Fund	: Reject claim for Clothing	Claim Status	: Current
Area	:	Officer	: S	Social Services	:
DWP Office	:	Received Date	: 17/01/2014	Portal Reference	:
Start Date	: 13/01/2014	End Date	: 09/07/2014	Review Date	: 24/01/2014
Claim Cost	:	Calculated Cost	:	Serial Number	:

2. Click the **Edit** hyperlink for the **Authorisation Details** section to display the editable fields relating to authorisation details.

The screenshot shows the 'Authorisation Details' form. It includes a dropdown menu for 'Authorised' with a calendar icon, a date field set to '17/01/2014', and a 'Last Updated On' field set to '17/01/2014'. There are 'Cancel' and 'Save' buttons at the bottom right.

3. Select the required **Status**. If you change the status to **Rejected** and the parent/carer associated with the current application has other active applications, you are asked if you want to reject the other active applications as well.

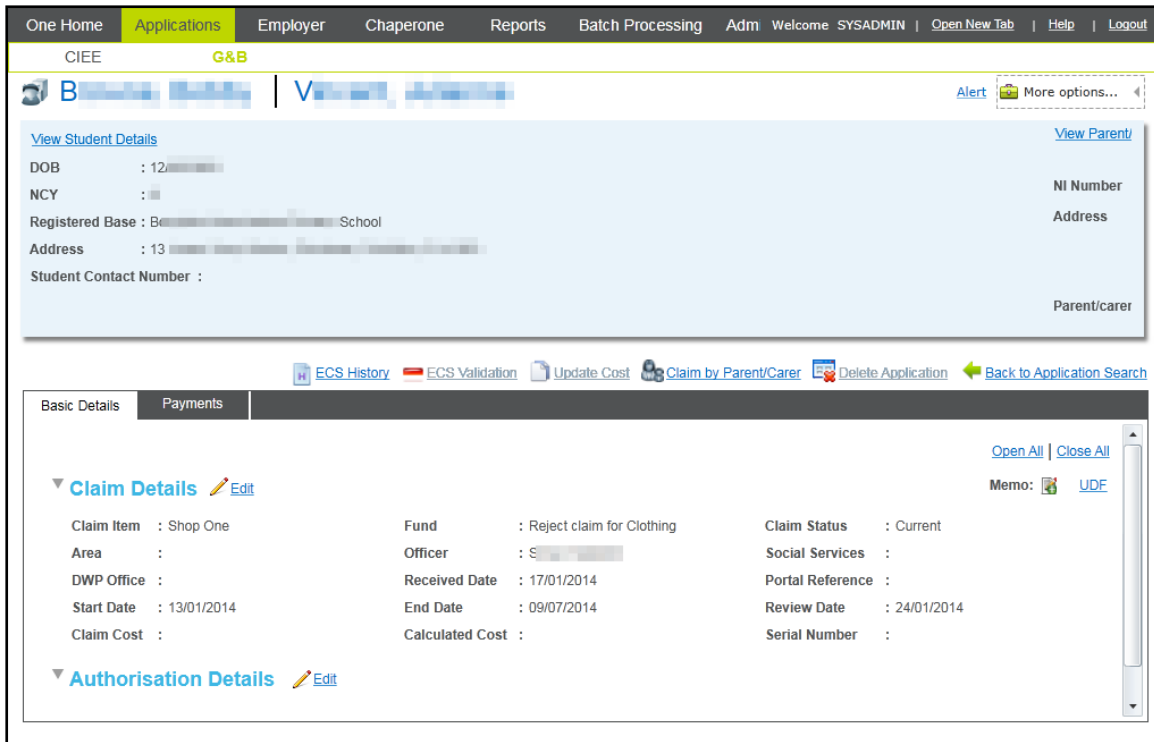
TIP: If you choose to reject the other applications associated with the carer and you edited the **End Date** or **Claim status** of the first application, then the updated details are applied to all rejected applications.

4. Click the **Save** button.

Deleting an Existing Application

A G&B application can be deleted if the **Status** of the application (as recorded in the **Basic Details** tab) is either **Rejected** or **Pending**. Applications with a **Status** of **Authorised** cannot be deleted.

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 43.



2. Click the **Delete Application** hyperlink to display the **Delete Application** confirmation dialog.
3. Click the **Yes** button delete the application. When the application is deleted, a confirmation message is displayed.
4. Click the **OK** button.

More Information:

[Editing Authorisation Status](#) on page 52

Recording Payment Details

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 43.

Creating a New Grants and Benefits Application

The screenshot shows the 'Applications' section of the system. At the top, there is a navigation bar with 'Applications' highlighted. Below it, the user is logged in as 'CIEE' with 'G&B' as the application type. The main area displays student details for a student with ID 'B...' and 'V...'. Fields include DOB, NCY, Registered Base (School), Address, and Student Contact Number. A 'View Student Details' link is present. To the right, there are links for 'View Parent', 'NI Number', 'Address', and 'Parent/carer'. Below the student details, there are several action buttons: 'ECS History', 'ECS Validation', 'Update Cost', 'Claim by Parent/Carer', 'Delete Application', and 'Back to Application Search'. The 'Basic Details' tab is selected, showing 'Claim Details' and 'Authorisation Details' sections. The 'Claim Details' section includes fields for Claim Item (Shop One), Fund (Reject claim for Clothing), Claim Status (Current), Area, Officer, DWP Office, Received Date (17/01/2014), Start Date (13/01/2014), End Date (09/07/2014), Claim Cost, Calculated Cost, Social Services, Portal Reference, Review Date (24/01/2014), and Serial Number. There are 'Open All' and 'Close All' links and a 'Memo' field with a 'UDF' link.

2. Select the **Payments** tab.

The screenshot shows the 'Payments' tab selected. The 'Basic Details' tab is also visible. The 'Payment Details' section is active, showing a '+ Add' hyperlink. The rest of the page is currently blank, indicating that the 'Add' button has not yet been clicked to reveal the form fields.

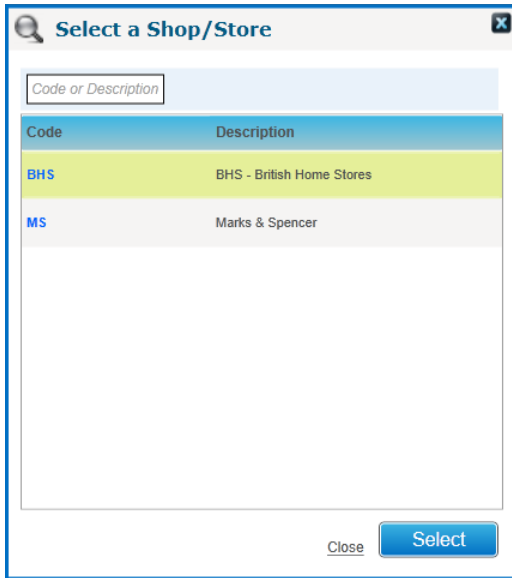
3. Click the **Add** hyperlink to display the editable fields relating to payment details.

The screenshot shows the 'Payment Details' form with the following fields:

- Cost Centre
- Payment Date (dd/mm/yyyy)
- Release Date (dd/mm/yyyy)
- Cheque Number
- Date Cashed (dd/mm/yyyy)
- Shop/Store
- Invoice
- Amount
- VAT

At the bottom right, there are 'Cancel' and 'Save' buttons.

4. Select a **Payment Date**.
5. Click the **Shop/Store** browse button to display the **Select a Shop/Store** browser.



6. Highlight the required shop then click the **Select** button to add it to the application and close the dialog.
7. Enter an **Amount** for the payment.
8. Enter any other optional information.
9. Click the **Save** button.

Editing Payment Details

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 43.
2. Select the **Payments** tab.
3. For the payment you wish to update, click the **Edit** hyperlink to enable editing.
4. Make the required changes to the payment details.
5. Click the **Save** button.

Deleting Payment Details

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 43.
2. Select the **Payments** tab.
3. For the payment you wish to remove, click the **Delete** hyperlink to display the **Delete Payment Details** confirmation dialog.
4. Click the **Yes** button to delete the payment details.

Viewing Grants and Benefits Claim Details for a Student

All the claims that a student is associated with are displayed in the **Claims Details** tab. From here, you can view a student's details or specific claim applications.

1. Open an application to which the student is associated. For more information, see [Opening an Existing Application](#) on page 43.

Creating a New Grants and Benefits Application

- Click the **View Student Details** hyperlink to display the student's information.

- Select the **Claim Details** tab to display the list of claims made on behalf of the student.

Parent/Carer Name	Claim Item	Start Date	End Date	Review Date	Cost	Authorisation Status	Claim Status	Memo	Application
A...	abc1	23/05/2013	31/05/2013	23/05/2013	1.94	Pending	Current		View Application

- To view details of the student, click their name to display the **Person Details** dialog.
- To view a specific application, click the required **View Application** hyperlink.

Updating a Claim Cost

The claim cost of Free School Meals item claims that have a cost defined in the default details can be calculated using the following formula:

$$\text{Claim Cost} = \text{Annual FSM cost} * (\text{Days School Open in Claim} / \text{Annual School Days})$$

If any of the variables in the formula are changed (e.g. the FSM cost changes), you can update the cost of individual claims. To update the cost of a claim:

- Open the application for a claim that needs the cost updating. For more information, see [Opening an Existing Application](#) on page 43.

2. Click the **Update Cost** hyperlink.

Batch Processing

The **Batch Processing** area enables you to update the details of multiple applications at once. For example, if an officer has left, you can search for all applications connected to the officer and assign a new officer to all the affected applications. For more information on updating multiple applications at once, see [Updating Multiple Applications via Batch Processing](#) on page 57.

Updating Multiple Applications via Batch Processing

1. From the One homepage, click the **Applications** button to display the **Applications** area.

The screenshot displays the 'Applications' section of a web application. At the top, a navigation bar includes 'One Home', 'Applications' (highlighted), 'Employer', 'Chaperone', 'Reports', 'Batch Processing', and 'Administration'. A user greeting 'Welcome SYSADMIN | Help | Logout' is on the right. Below the navigation, the page title is 'CIEE G&B'. The main content area is titled 'Applications' and includes a '+ Add New Application' link. There are two search input fields: 'Student Name' and 'Employer Name'. Below these fields are 'More Options', 'Clear Search', and a blue 'Search' button. A table is present with the following columns: 'Student Name', 'Employer Name Performance Name', 'Start Date', 'End Date', 'Student Address', 'Student DOB', 'Student NCY', 'Employer Address', and 'Current Employer contact'. The table body is currently empty.

2. Select the **Batch Processing** area.

Creating a New Grants and Benefits Application

The screenshot shows the 'Entertainment Batch Process' page. At the top, there is a navigation bar with 'Batch Processing' highlighted. Below the navigation bar, there are two input fields: 'Student Name' and 'Employer Name'. A 'More Options' link is visible below the input fields. A search bar contains 'Clear Search' and a 'Search' button. Below the search bar is a table with the following columns: Student Name, Employer Name, Performance Name, Start Date, End Date, Application Status, Student Address, Student DOB, Student NCY, Employer Address, and Current Employer Contact. The table is currently empty. At the bottom left, there is a 'Display Applications' button.

3. Select the **G&B** page.

The screenshot shows the 'G&B Batch Process' page. At the top, there is a navigation bar with 'Batch Processing' highlighted. Below the navigation bar, there are several input fields: 'Parent/Carer Name', 'Start Date: (dd/mm/yy)', 'End Date: (dd/mm/yy)', 'Claim Item', 'Claim Status', and 'Fund'. A 'More Options' link is visible below the input fields. A search bar contains 'Clear Search' and a 'Search' button. Below the search bar is a table with the following columns: Student Name, Parent/Carer, and Status. The table is currently empty. At the bottom left, there is a 'Display Applications' button. On the right side of the page, there is a message: 'No Application Selected'.

4. Enter the search criteria for the applications you wish to edit.
5. To search using more specific application details, click the **More Options** hyperlink to display the **More Search Options** dialog.

- Click the **Search** button to display a list of results that match the entered search criteria.

<input type="checkbox"/>	Student Name	Parent/Carer	Status
<input type="checkbox"/>	A	B	Authorised
<input type="checkbox"/>	B	B	Authorised
<input type="checkbox"/>	B	B	Authorised
<input type="checkbox"/>	B	B	Authorised
<input type="checkbox"/>	B	B	Authorised
<input type="checkbox"/>	B	B	Authorised

- Select the check box for each application to which you wish to make the same change, e.g. all the applications for which you want to change the **Authorise Status**.
- Click the **Display Applications** button to display the selected applications in a grid.

IMPORTANT NOTE: Although all selected records will be updated as expected, due to performance issues, only the first 100 selected records are displayed when you click the **Display Applications** button.

Creating a New Grants and Benefits Application

One Home Applications Employer Chaperone Reports **Batch Processing** Administration Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE **G&B**

4 Application(s) selected

Student Name	Parent/Carer	Start Date	End Date	Review Date	Authorisation Status	Claim Status
Alda, Noah	Brown, Liv	25/09/2013	04/11/2014	09/02/2014	Authorised	Current
Ball, Linda	Brown, Jim	02/11/2013	21/10/2014	02/02/2014	Authorised	Current
Birch, Christine	Brown, Burt	10/11/2013	25/10/2014	26/02/2014	Authorised	Current
Black, Alan	Brown, Kirk	14/10/2013	13/07/2014	28/03/2014	Authorised	Current

Normal View

Batch Update

Claim Item Fund Claim Status

Area Officer Social Services

DWP Office End Date: (dd/mm/yyyy) Review Date: (dd/mm/yyyy)

Authorise Status

Cancel Process

9. In the **Batch Update** section, make the required changes to the application details.

One Home Applications Employer Chaperone Reports **Batch Processing** Administration Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE **G&B**

4 Application(s) selected

Student Name	Parent/Carer	Start Date	End Date	Review Date	Authorisation Status	Claim Status
Alda, Noah	Brown, Liv	25/09/2013	04/11/2014	09/02/2014	Authorised	Current
Ball, Linda	Brown, Jim	02/11/2013	21/10/2014	02/02/2014	Authorised	Current
Birch, Christine	Brown, Burt	10/11/2013	25/10/2014	26/02/2014	Authorised	Current
Black, Alan	Brown, Kirk	14/10/2013	13/07/2014	28/03/2014	Authorised	Current

Normal View

Batch Update

Claim Item Fund EXPD - Expired

Area SL - Simon Langton Social Services

DWP Office End Date: (dd/mm/yyyy) Review Date: (dd/mm/yyyy)

Authorise Status

Cancel Process

10. Click the **Process** button to display the **G&B Batch Update** confirmation dialog.
11. Click the **Yes** button to update the records and display another **G&B Batch Update** confirmation dialog.
12. Click the **OK** button to complete the process.

Checking Free School Meal Eligibility

One can use the Eligibility Checking Service (ECS) provided by the Department for Work and Pension to check if applicants are eligible to receive Free School Meals (FSM). The service takes the National Insurance (NI) number or National Asylum Support Service (NASS) number recorded for the parent/carer and checks it against the DWP eligibility database. The check can be run against a single application or against multiple applications at once via the **ECS Validation** tab in the **Administration** area.

Eligibility Checking Service (ECS) Validation for Individual Applicants

There are two ways to check the FSM eligibility of an individual using the Eligibility Checking Service (ECS). You can run the check while creating the application or you can run it from an existing application.

When creating an application, the **ECS Validation** hyperlink becomes active as soon as the parent/carer is added to the application. However, the check will not be valid until an FSM related claim type has been assigned to the application. If the parent/carer making the application does not have parental responsibility assigned in One, then you can run the check and One will automatically assign parental responsibility.

Alternatively, you can open an existing application and click the **ECS Validation** hyperlink. If the parent/carer does not have parental responsibility assigned, then you must assign this manually before the ECS Validation link becomes active.

The screenshot displays the 'Administration' section of the One system. At the top, there is a navigation bar with 'Applications' highlighted. Below this, the 'G&B' section is active, showing 'View Student Details' and 'View Parent/Carer Details'. The 'View Parent/Carer Details' section includes fields for NI Number, Address, Parent/Carer Contact Number, Asylum Seeker status, and NASS Number. Below this, there are several action links: 'ECS History', 'ECS Validation', 'Update Cost', 'Claim by Parent/Carer', 'Delete Application', and 'Back to Application Search'. The 'ECS Validation' link is highlighted in red. The main content area shows 'Basic Details' and 'Payments' tabs. Under 'Basic Details', there are sections for 'Claim Details' and 'Authorisation Details'. The 'Claim Details' section includes fields for Claim Item (FSM Primary), Area (Southern Area Education Office), DWP Office, Start Date (09/10/2017), Claim Cost (1.30), Fund (Free School Meals Fund), Officer, Received Date (09/10/2017), End Date (29/11/2019), Calculated Cost, Claim Status (Current), Social Services, Portal Reference, Review Date (21/07/2001), and Serial Number. The 'Authorisation Details' section shows Status (Pending), Authorised Date (09/10/2017), Last Updated On (09/10/2017), and Last Updated By (System Administrator).

After clicking the link, the check is performed with the DWP against the selected parent/carer and a message is returned either confirming or denying FSM eligibility.

NOTE: When the result of the ECS check for FSM eligibility is Not Found, a qualifier code is also returned. This is stored on the FSM check record. The qualifier code is interpreted and displayed on the results model window. For more information, see [Interpreting the Qualifier Code](#) on page 62.

If you receive an error message when trying to check eligibility, see [Troubleshooting an ECS Validation Failure](#) on page 67.

More Information:

- [Opening an Existing Application](#) on page 43
- [Adding a Dependent](#) on page 69
- [Adding a New Parent/Carer to the One Database](#) on page 43
- [Updating Parental Responsibility](#) on page 47

Interpreting the Qualifier Code

When a check result for FSM comes back as Not Found, a qualifier is also returned. This code is stored on the FSM check record. In the case of an individual check, the code is interpreted as shown in the following table:

Qualifier	Interpretation
Final	The check result stands and no further action is required.
Pending	The information to process the check is not yet available and could take up to 6 weeks. The check should be periodically re-run.
No Trace	Details entered may be incorrect. The parent should re-enter their details.
Manual Process	The parent should provide further evidence and the LA should raise a manual query on the ECS web portal.
Manual Query	

Viewing Parent/Carer Eligibility Checking Service (ECS) History

You can view the ECS history of a parent/carers by opening any application associated with the required parent/carers and then clicking the **ECS History** hyperlink.

Student Name	Claim Description	Start Date	End Date	Eligibility Status	Qualifier	Process Date
Test Child11, Test Child11	General Free School Meal	21/05/2018	19/08/2018	FoundAndEligible	Manual process	23/05/2018

Eligibility Checking Service (ECS) Validation for Multiple Applications

G&B uses the ECS service to batch check the eligibility of multiple FSM applicants. The batch processing of FSM claims has three stages; submitting a batch of applications to the DWP for

eligibility checking, checking the status of the checks, then updating the One database with the eligibility information provided by the DWP.

NOTE: When the result of an ECS check is Not Found, a qualifier code is also returned. This is stored on the individual FSM check record.

When an ECS batch process is run, it selects automatically all the claims currently recorded in the One database that meet the following criteria:

- A parent/carer is included in the claim.
- The **Claim Code** starts with 'FSM'.
- The **Claim Status** is either **Current** or **Pending** (a batch can include either current or pending applications, or both).

One then performs additional validation checks before sending an application to the DWP. One verifies that any applications also contain the following information regarding the parent/carer:

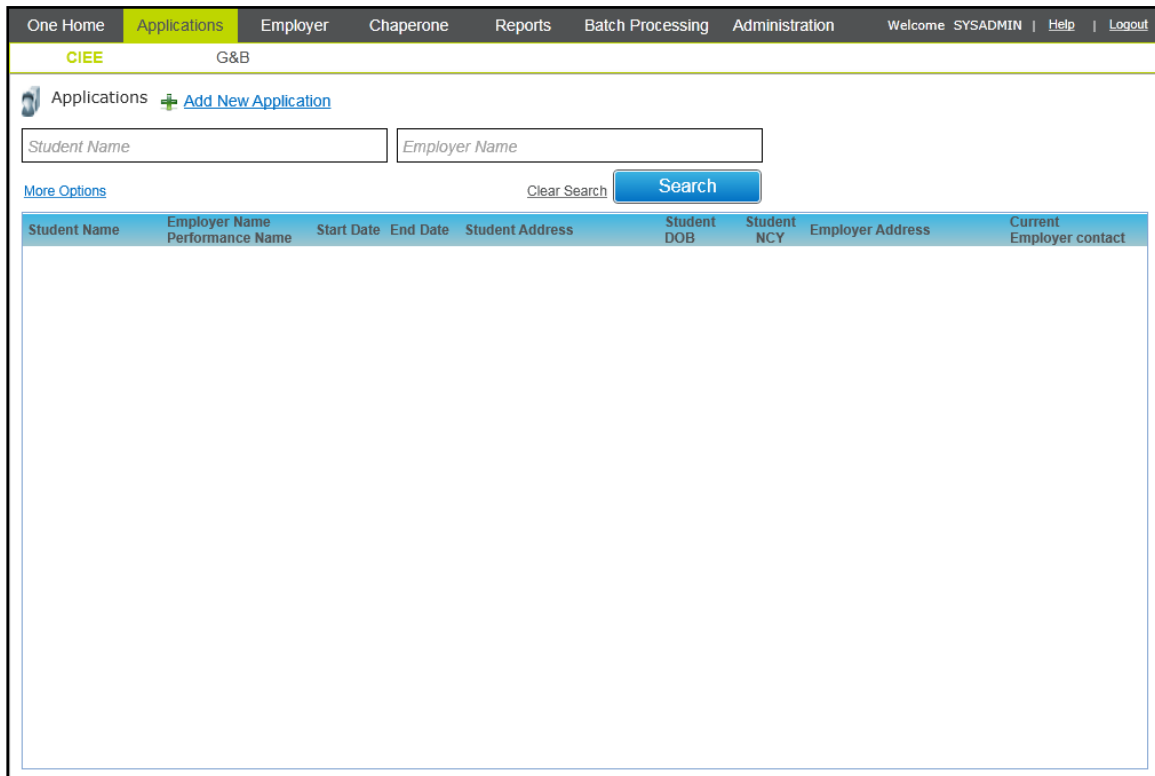
- Surname
- Date of Birth
- National Insurance (NI) number or National Asylum Support Service (NASS) number

One does not submit applications without all this information to the DWP as they would be rejected as invalid claims.

After a batch of applications is sent to and processed by the DWP, the returned records must be incorporated into the One database.

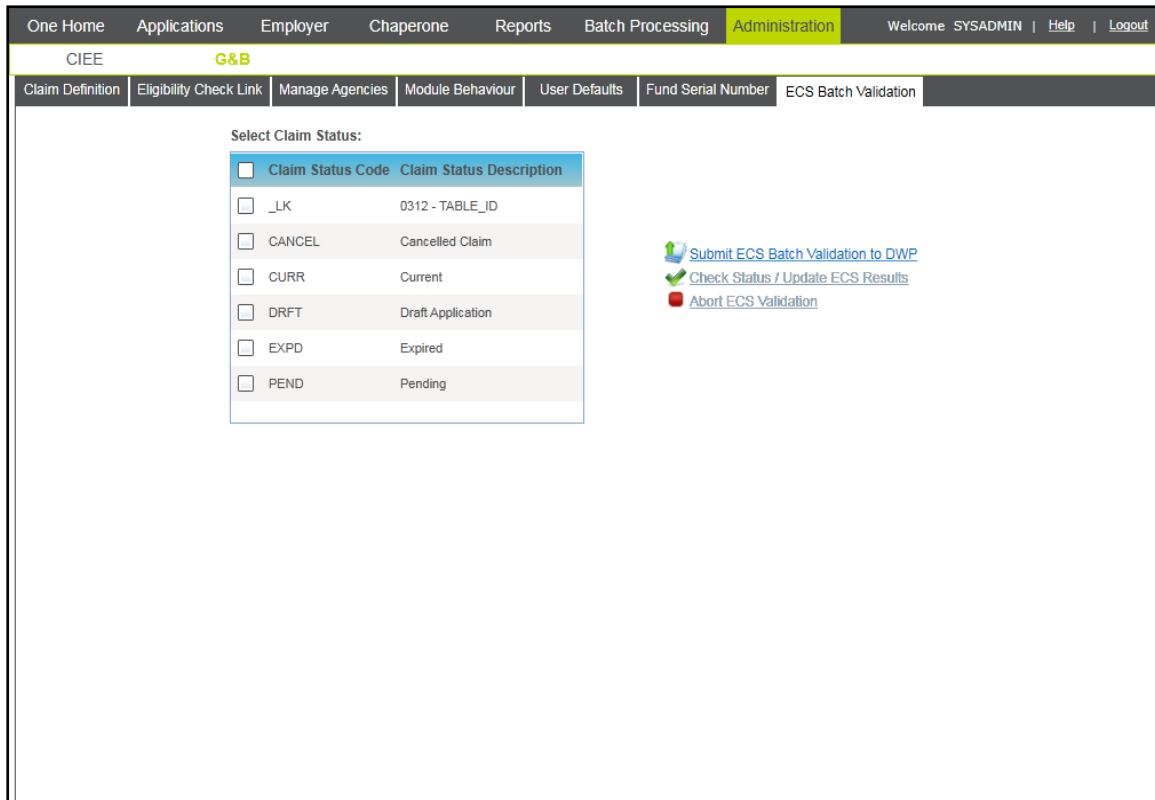
To submit multiple applications to the ECS service for FSM checking, complete the following procedure:

1. From the One homepage, click the **Applications** button to display the **Applications** area.



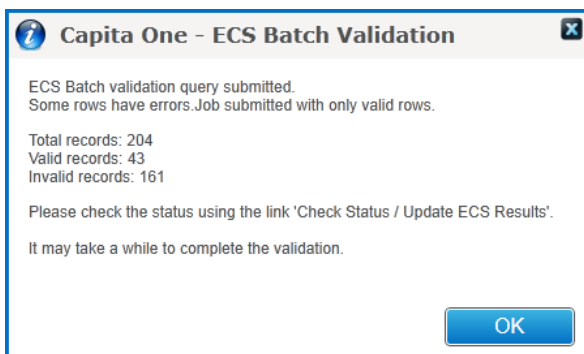
2. Select the **Administration** area.
3. Select the **ECS Batch Validation** tab.

Creating a New Grants and Benefits Application



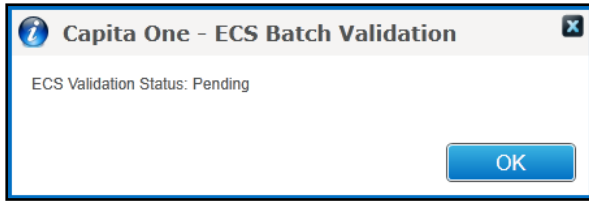
- Select the check box for the types of claims you wish to process.
- Click the **Submit ECS Batch Validation to DWP** hyperlink to display the **ECS Batch Validation** dialog.
- Click the **Yes** button to start the local validation of applications.

After the validation is complete, another **Capita One – ECS Batch Validation** dialog is displayed. This details the number of records that are in a valid format and how many are in an invalid format.



- Click the **OK** button to send the applications to the DWP and start the ECS checks. After submission, the **Check Status / Update ECS Results** hyperlink becomes active. If you receive an error message when trying to check eligibility, see *Troubleshooting an ECS Validation Failure* on page 67.
- Click the **Check Status / Update ECS Results** hyperlink to view the progress of the checks.

If the DWP has not finished processing the records, the current status of the ECS batch submission is displayed:



NOTE: There is no indication of the progress of the validation and there is no automatic notification when the process is complete. Therefore, you should click the **Check/Status/Update ECS Results** hyperlink periodically until the status is returned as **Complete**.

If **ECS Validation Status** is **Complete**, after you click the **OK** button then you are presented with blank fields for new review dates.

You now must save the results of the ECS check to the One database.

9. Enter a Pending – Next Review Date.

When saved, this will update any records that were found to be ineligible for FSM with the entered review date. If left blank, the existing review date for the ineligible records is unchanged.

10. Enter a Current – Next Review Date.

When saved, this will update any records that were found to be eligible for FSM with the entered review date. If left blank, the existing review date for the eligible records are unchanged.

11. If required, select the claim status you want to assign to each type of processed claim. The DWP categorises processed claims into three categories, Valid & Eligible, Not Found and Error.

12. To update the authorisation status of all eligible records to Authorised, select the Authorise current claims? check box.

13. Click the Save button to display the ECS Batch Validation dialog.

14. Click the Yes button to display a confirmation dialog.

15. Click the OK button.

Aborting an ECS Validation

If after submitting the records to the DWP you need to stop the processing of the claims, you must abort the validation.

1. From the One homepage, click the Applications button to display the Applications area.

Creating a New Grants and Benefits Application

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Applications + Add New Application

Student Name Employer Name

More Options Clear Search Search

Student Name	Employer Name Performance Name	Start Date	End Date	Student Address	Student DOB	Student NCY	Employer Address	Current Employer contact
--------------	--------------------------------	------------	----------	-----------------	-------------	-------------	------------------	--------------------------

2. Select the **Administration** area.
3. Select the **ECS Batch Validation** tab.

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number ECS Batch Validation

Select Claim Status:

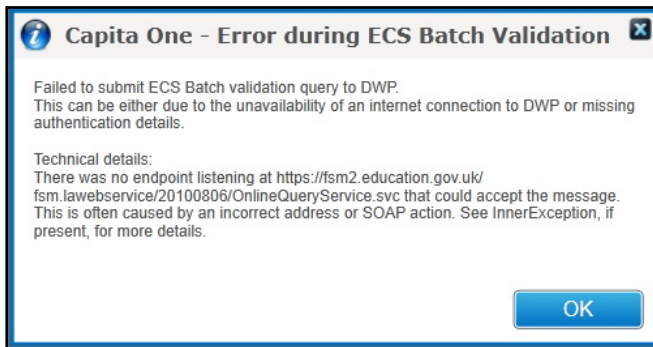
<input type="checkbox"/>	Claim Status Code	Claim Status Description
<input type="checkbox"/>	_LK	0312 - TABLE_ID
<input type="checkbox"/>	CANCEL	Cancelled Claim
<input type="checkbox"/>	CURR	Current
<input type="checkbox"/>	DRFT	Draft Application
<input type="checkbox"/>	EXPD	Expired
<input type="checkbox"/>	PEND	Pending

Submit ECS Batch Validation to DWP
 Check Status / Update ECS Results
 Abort ECS Validation

4. Click the **Abort ECS Validation** hyperlink to display a confirmation dialog.
5. Click the **Yes** button to cancel the validation. You can now submit a new ECS batch validation job to the DWP.

Troubleshooting an ECS Validation Failure

If G&B cannot connect to the ECS Validation service at the DWP, an error message, similar to the following graphic, is displayed:



Generally, these errors can be resolved by checking the following:

- Ensure that the system you are connecting from has access to the Internet and is not being blocked by a firewall or proxy.
- Ensure that ECS related details entered on the **Applications | Administration | Module Behaviour Options** tab are entered correctly.

04 / Maintaining Parent/Carer Details

Introduction

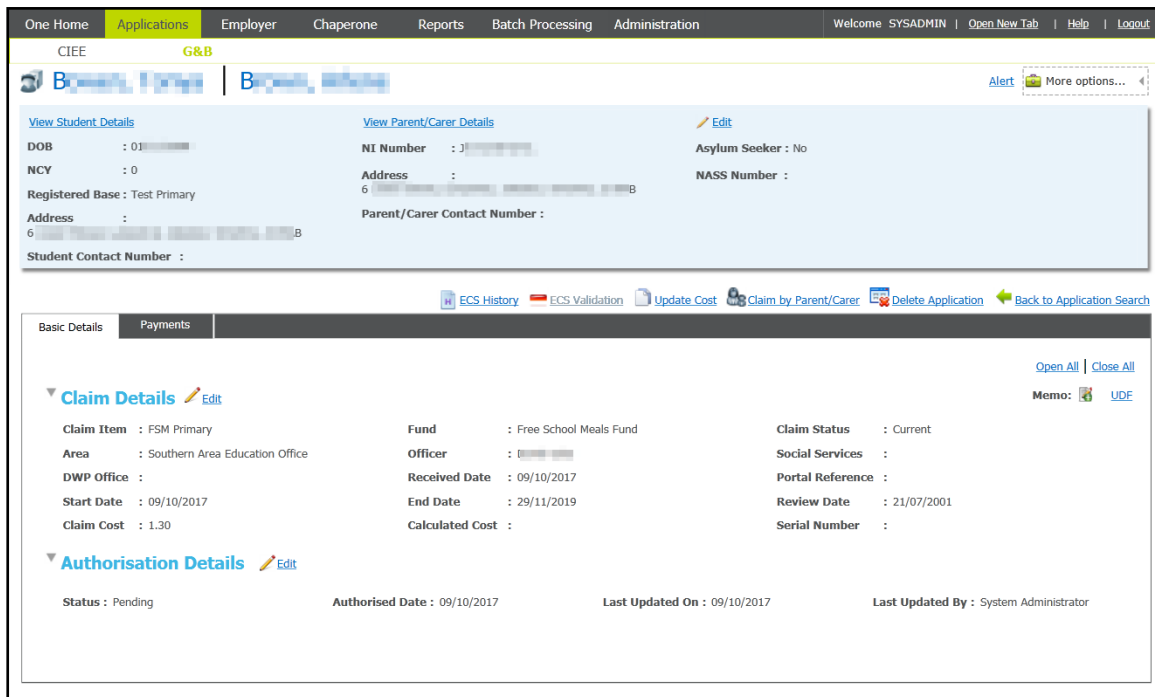
Given the types of checks that can be run in G&B, it is important that the details of the parent and carer making claims are kept current. You can maintain information about a parent or carer’s basic details, dependents, the benefits they receive and you can view the claims they have made.

Adding a Dependent

In order for a person to be added as a parent or carer to a claim application, the student associated with the claim must be a dependent. Although the association can be made between a student and a parent/carers when creating a new application, students can also be added as a dependent beforehand via the **Dependents** tab. Once added as a dependent, the parent/carers is available for selection in the **Select Parent/Carer** dialog for that student.

In order to use the ECS functionality to verify FSM eligibility for a student, you must select the **Parental Responsibility** check box when adding the student as a dependent of the parent/carers.

1. Open an application with which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 43.



2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer’s information.

Maintaining Parent/Carer Details

3. Select the **Dependents** tab.

Dependant Name	Parental Responsibility	Relationship To Dependant	Date of Birth
W [redacted]	Yes	Mother	0 [redacted]
H [redacted]	Yes	Mother	0 [redacted]

4. Click the **Add** hyperlink to display the editable fields relating to dependent details.

5. Click the **Student Name** browse button to display the **Select Student** browser.

NOTE: If you know the student is not already in the One database, click the **Add New Student** hyperlink to add a new student. For more information see, [Adding a New Student to the One Database](#) on page 43.

Select Student

Student Name or Unique Pupil Number Student ID NCY

DOB: (dd/mm/yyyy) Gender Postcode Active Students only

Base Name, URN or School No.

Clear Search Search

Student Name	Chosen Name	Given Name	Middle Name	UPN	Base Name	Student Id	Postcode	NCY
--------------	-------------	------------	-------------	-----	-----------	------------	----------	-----

Close Select

6. Enter the required search criteria then click the **Search** button to display a list of students who match the search criteria.

Select Student

Student Name or Unique Pupil Number Student ID NCY

DOB: (dd/mm/yyyy) Gender Postcode Active Students only

Base Name, URN or School No.

Clear Search Search

69 Students matching "smith, Active People"

Student Name	Chosen Name	Given Name	Middle Name	UPN	Base Name	Student Id	Postcode	NCY
<input type="checkbox"/>								11
<input type="checkbox"/>								11
<input type="checkbox"/>								8
<input checked="" type="checkbox"/>								10
<input type="checkbox"/>								3
<input type="checkbox"/>								9

Close Select

7. Select the check box adjacent to the student you wish to add as a dependent then click the **Select** button to add them and close the browser.

Maintaining Parent/Carer Details

Basic Details | Dependants | Department Work Pensions And Eligibility Check | Claim Details | Contact Details | Address

Dependant Details [+ Add](#)

B [Name] Address: 6 [Address] B

[+ Add New Student](#)

Registered Base: Test Primary

Parental Responsibility

DOB: 01/[DOB] NCY: 0 Relationship [Relationship] * Age: [Age] As on: 09/10/2017

[Cancel](#) [Save](#)

8. Select the **Relationship** from the drop-down list.
9. If required, select the **Parental Responsibility** check box.
10. Click the **Save** button.

Viewing Dependents

1. Open an application to which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 43.

One Home | Applications | Employer | Chaperone | Reports | Batch Processing | Administration | Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

[View Student Details](#) [View Parent/Carer Details](#) [Edit](#)

DOB : 01/[DOB] NI Number : J/[NI] Asylum Seeker : No

NCY : 0 Address : 6/[Address] B NASS Number :

Registered Base : Test Primary Parent/Carer Contact Number :

Address : 6/[Address] B

Student Contact Number :

[ECS History](#) [ECS Validation](#) [Update Cost](#) [Claim by Parent/Carer](#) [Delete Application](#) [Back to Application Search](#)

Basic Details | Payments

[Open All](#) | [Close All](#) Memo: [UDE](#)

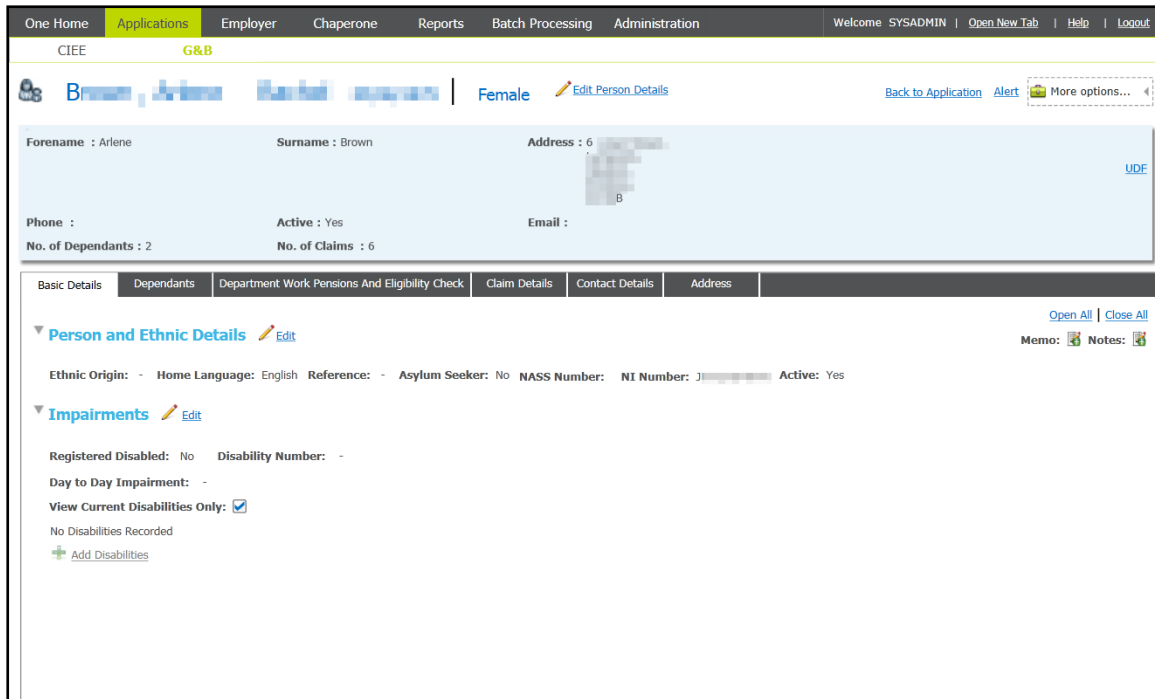
Claim Details [Edit](#)

Claim Item : FSM Primary	Fund : Free School Meals Fund	Claim Status : Current
Area : Southern Area Education Office	Officer : [Officer]	Social Services :
DWP Office :	Received Date : 09/10/2017	Portal Reference :
Start Date : 09/10/2017	End Date : 29/11/2019	Review Date : 21/07/2001
Claim Cost : 1.30	Calculated Cost :	Serial Number :

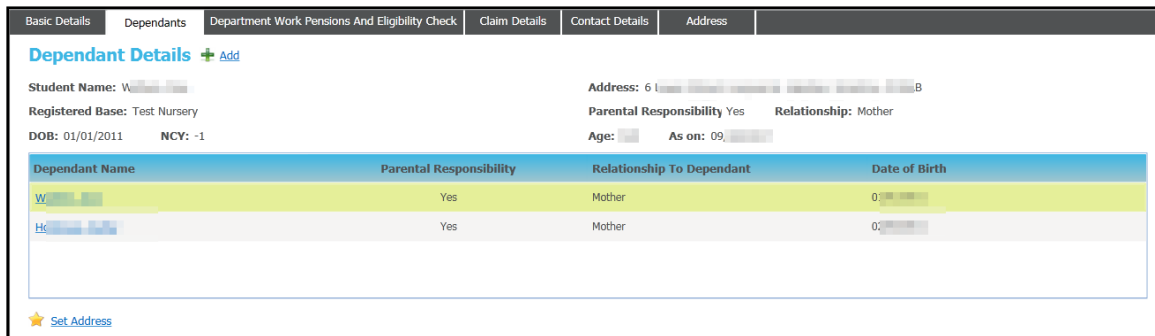
Authorisation Details [Edit](#)

Status : Pending Authorised Date : 09/10/2017 Last Updated On : 09/10/2017 Last Updated By : System Administrator

2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.



3. Select the **Dependents** tab to display the list of dependents.



4. To view details about a specific student, click their name in the list to display the **Person Details** dialog.

Verifying Individual FSM Eligibility

G&B enables users to check the eligibility of a parent/carer to make a claim for Free School Meals. This can either be done on an individual basis or as a batch process.

To check the eligibility of an individual, you can click the **ECS Validation** hyperlink when creating an application. This becomes active as soon as the parent/carer is added to the application. Alternatively, the check can be performed after the application is created by opening the application and clicking the **ECS Validation** hyperlink.

More Information:

- [Creating a New Grants and Benefits Application \(Student-Centric\)](#) on page 29
- [Creating a New Grants and Benefits Application \(Parent-Centric\)](#) on page 36
- [Checking Free School Meal Eligibility](#) on page 61

Setting Dependent Addresses

The **Dependents** tab enables you to assign or change addresses for the dependents of a selected parent or carer. You can assign a student’s address to a carer, assign a parent’s address to an individual student or apply a parent’s address to all the dependents.

1. Open an application with which the parent or career is already associated. For more information, see [Opening an Existing Application](#) on page 43.

The screenshot displays the 'View Parent/Carer Details' interface. At the top, there are navigation tabs: One Home, Applications (selected), Employer, Chaperone, Reports, Batch Processing, and Administration. The user is logged in as SYSADMIN. The main content area is divided into two sections. The first section, 'View Parent/Carer Details', includes fields for NI Number, Address, Parent/Carer Contact Number, and Asylum Seeker status. The second section, 'Claim Details', is expanded and shows a table of claim information with columns for Claim Item, Fund, Claim Status, Area, Officer, Received Date, End Date, Claim Cost, Social Services, Portal Reference, Review Date, and Serial Number. Below this, the 'Authorisation Details' section shows the status as Pending and the authorised date as 09/10/2017.

2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer’s information.

The screenshot displays the 'View Person Details' interface. At the top, there are navigation tabs: One Home, Applications (selected), Employer, Chaperone, Reports, Batch Processing, and Administration. The user is logged in as SYSADMIN. The main content area is divided into two sections. The first section, 'View Person Details', includes fields for Forename, Surname, Address, Phone, Active status, and Email. The second section, 'Person and Ethnic Details', is expanded and shows fields for Ethnic Origin, Home Language, Reference, Asylum Seeker status, NASS Number, NI Number, and Active status. Below this, the 'Impairments' section shows Registered Disabled status, Disability Number, Day to Day Impairment, and a checkbox for View Current Disabilities Only.

3. Select the **Dependents** tab.

Basic Details | Dependants | Department Work Pensions And Eligibility Check | Claim Details | Contact Details | Address

Dependant Details + Add

Student Name: W... Address: 6... B
 Registered Base: Test Nursery Parental Responsibility Yes Relationship: Mother
 DOB: 01/01/2011 NCY: -1 Age: As on: 09...

Dependant Name	Parental Responsibility	Relationship To Dependant	Date of Birth
W...	Yes	Mother	0...
H...	Yes	Mother	0...

★ Set Address

- Highlight the student whose address you want to either change or assign to the parent then click the **Set Address** hyperlink to display the **Set Address** dialog.

Set Address

Copy Student Address to this Parent/Carer
 Copy Parent/Carer Address to this Student
 Copy Parent/Carer Address to all Dependants

Current Student Address:
 19...

Current Parent/Carer Address:
 17...

Other Dependant's Address:

Surname	ForeName	Address
S...		
S...		

Cancel Select

- Select the required option then click the **Select** button to record the address changes. After the addresses are updated, the **Set Address** dialog closes automatically.

Adding Benefit Claims

All of the benefits claimed by a parent/carer should be recorded in the **Department Work Pensions and Eligibility Check** tab. If G&B has been configured to perform eligibility checks for new applications, One checks the items in this tab to verify whether the parent/carer receives the required benefits before allowing an application to be saved with a **Status** of **Authorised**.

- Open an application with which the parent or career is already associated. For more information, see [Opening an Existing Application](#) on page 43.

Maintaining Parent/Carer Details

2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.

3. Select the **Department Work Pensions and Eligibility Check** tab.

4. Click the **Add** hyperlink to display editable fields relating to the claim.

5. Click the **Benefit** browse button to display the **Benefit** browser.

Code	Description
AS	Asylum Seeker
CTC	Child Tax Credit
FMCRDT	Family Credit
IS	Income Support
JSAIB	Job Seeker Allow-Income Based

6. Highlight the required benefit then click the **Select** button to add it to the record and close the dialog.
7. Select the required **Start Date** and **End Date**.
8. Click the **Save** button.

Benefit	Start Date	End Date
Child Tax Credit	01/07/2017	19/01/2018

Viewing Benefit Claims

1. Open an application with which the parent or career is already associated. For more information, see [Opening an Existing Application](#) on page 43.

Maintaining Parent/Carer Details

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN Open New Tab Help Logout

CIEE G&B

[View Student Details](#) [View Parent/Carer Details](#) [Edit](#)

DOB : 01/01/1980 NI Number : J123456789 Asylum Seeker : No
 NCY : 0 Address : 6/123456789/10111213141516171819202122232425262728293031323334353637383940414243444546474849505152535455565758596061626364656667686970717273747576777879808182838485868788899091929394959697989900
 Registered Base : Test Primary Parent/Carer Contact Number :
 Address : 6/123456789/10111213141516171819202122232425262728293031323334353637383940414243444546474849505152535455565758596061626364656667686970717273747576777879808182838485868788899091929394959697989900
 Student Contact Number :

[ECS History](#) [ECS Validation](#) [Update Cost](#) [Claim by Parent/Carer](#) [Delete Application](#) [Back to Application Search](#)

Basic Details Payments

Claim Details [Edit](#) [Open All](#) [Close All](#) Memo: [UDF](#)

Claim Item : FSM Primary Fund : Free School Meals Fund Claim Status : Current
 Area : Southern Area Education Office Officer : 123456789 Social Services :
 DWP Office : Received Date : 09/10/2017 Portal Reference :
 Start Date : 09/10/2017 End Date : 29/11/2019 Review Date : 21/07/2001
 Claim Cost : 1.30 Calculated Cost : Serial Number :

Authorisation Details [Edit](#)

Status : Pending Authorised Date : 09/10/2017 Last Updated On : 09/10/2017 Last Updated By : System Administrator

2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN Open New Tab Help Logout

CIEE G&B

[Female](#) [Edit Person Details](#) [Back to Application](#) [Alert](#) [More options...](#)

Forename : Arlene Surname : Brown Address : 6/123456789/10111213141516171819202122232425262728293031323334353637383940414243444546474849505152535455565758596061626364656667686970717273747576777879808182838485868788899091929394959697989900
 Phone : Active : Yes Email :
 No. of Dependants : 2 No. of Claims : 6

Basic Details Dependants Department Work Pensions And Eligibility Check Claim Details Contact Details Address

Person and Ethnic Details [Edit](#) [Open All](#) [Close All](#) Memo: [UDF](#) Notes: [UDF](#)

Ethnic Origin: - Home Language: English Reference: - Asylum Seeker: No NASS Number: NI Number: J123456789 Active: Yes

Impairments [Edit](#)

Registered Disabled: No Disability Number: -
 Day to Day Impairment: -
 View Current Disabilities Only:
 No Disabilities Recorded
[Add Disabilities](#)

3. Select the **Department Work Pensions and Eligibility Check** tab to display the list of benefits that have been recorded for the parent/carers.

Basic Details Dependants Department Work Pensions And Eligibility Check Claim Details Contact Details Address

Department Work Pensions And Eligibility Check Details [Add](#)

Benefit: Child Tax Credit Start Date: 01/07/2017 End Date: 19/01/2018

Benefit	Start Date	End Date	
Child Tax Credit	01/07/2017	19/01/2018	Edit Delete

Editing a Benefit Claim

1. Open an application with which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 43.

The screenshot shows the 'View Parent/Carer Details' page. At the top, there's a navigation bar with 'Applications' highlighted. Below it, the page title is 'CIEE G&B'. The main content area is divided into two sections: 'View Student Details' and 'View Parent/Carer Details'. The 'View Parent/Carer Details' section contains fields for:

- DOB : 01/...
- NI Number : J...
- Asylum Seeker : No
- NCY : 0
- Address : 6...
- NASS Number :
- Registered Base : Test Primary
- Parent/Carer Contact Number :
- Address : 6...
- Student Contact Number :

 Below these fields are several action buttons: 'ECS History', 'ECS Validation', 'Update Cost', 'Claim by Parent/Carer', 'Delete Application', and 'Back to Application Search'. There are also 'Open All' and 'Close All' links. The 'Claim Details' section is expanded, showing:

- Claim Item : FSM Primary
- Area : Southern Area Education Office
- DWP Office :
- Start Date : 09/10/2017
- Claim Cost : 1.30
- Fund : Free School Meals Fund
- Officer : 0...
- Received Date : 09/10/2017
- End Date : 29/11/2019
- Calculated Cost :
- Claim Status : Current
- Social Services :
- Portal Reference :
- Review Date : 21/07/2001
- Serial Number :

 The 'Authorisation Details' section is also expanded, showing:

- Status : Pending
- Authorised Date : 09/10/2017
- Last Updated On : 09/10/2017
- Last Updated By : System Administrator

2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.

The screenshot shows the 'View Person Details' page. At the top, there's a navigation bar with 'Applications' highlighted. Below it, the page title is 'CIEE G&B'. The main content area is divided into two sections: 'View Student Details' and 'View Person Details'. The 'View Person Details' section contains fields for:

- Forename : Arlene
- Surname : Brown
- Address : 6...
- Phone :
- Active : Yes
- No. of Dependants : 2
- No. of Claims : 6
- Female

 Below these fields are several action buttons: 'Edit Person Details', 'Back to Application', 'Alert', and 'More options...'. There are also 'Open All' and 'Close All' links. The 'Person and Ethnic Details' section is expanded, showing:

- Ethnic Origin : -
- Home Language : English
- Reference : -
- Asylum Seeker : No
- NASS Number :
- NI Number : J...
- Active : Yes

 The 'Impairments' section is also expanded, showing:

- Registered Disabled : No
- Disability Number : -
- Day to Day Impairment : -
- View Current Disabilities Only:
- No Disabilities Recorded
- Add Disabilities

3. Select the **Department Work Pensions and Eligibility Check** tab to display the list of benefits that have been recorded for the parent/carers.

Maintaining Parent/Carer Details

Basic Details | Dependants | Department Work Pensions And Eligibility Check | Claim Details | Contact Details | Address

Department Work Pensions And Eligibility Check Details [Add](#)

Benefit: Child Tax Credit Start Date: 01/07/2017 End Date: 19/01/2018

Benefit	Start Date	End Date		
Child Tax Credit	01/07/2017	19/01/2018	Edit	Delete

4. For the benefit record you wish to update, click the **Edit** hyperlink to enable editing.
5. Make the required changes.
6. Click the **Save** button.

Deleting a Benefit Claim Record

1. Open an application with which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 43.

One Home | Applications | Employer | Chaperone | Reports | Batch Processing | Administration | Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

[View Student Details](#) | [View Parent/Carer Details](#) [Edit](#)

DOB : 01/01/1990 NI Number : J111111111 Asylum Seeker : No
NCY : 0 Address : 6 ... NASS Number :
Registered Base : Test Primary Parent/Carer Contact Number :
Address : 6 ...
Student Contact Number :

[ECS History](#) | [ECS Validation](#) | [Update Cost](#) | [Claim by Parent/Carer](#) | [Delete Application](#) | [Back to Application Search](#)

Basic Details | Payments

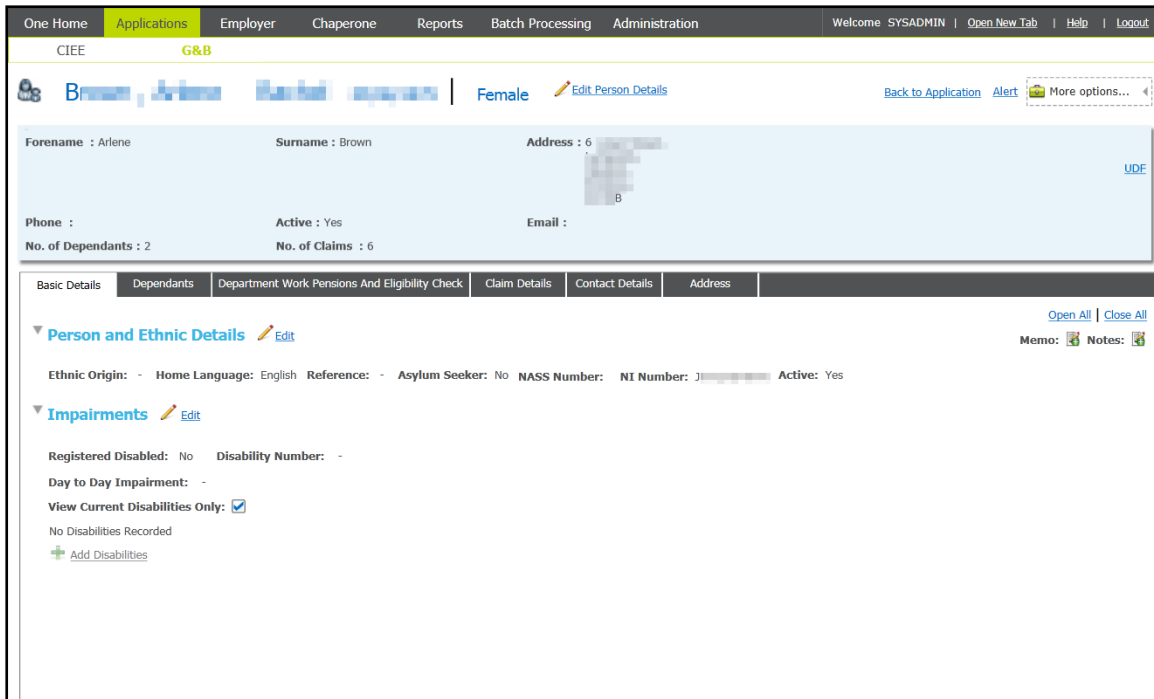
Claim Details [Edit](#)

Claim Item : FSM Primary Fund : Free School Meals Fund Claim Status : Current
Area : Southern Area Education Office Officer : Social Services :
DWP Office : Received Date : 09/10/2017 Portal Reference :
Start Date : 09/10/2017 End Date : 29/11/2019 Review Date : 21/07/2001
Claim Cost : 1.30 Calculated Cost : Serial Number :

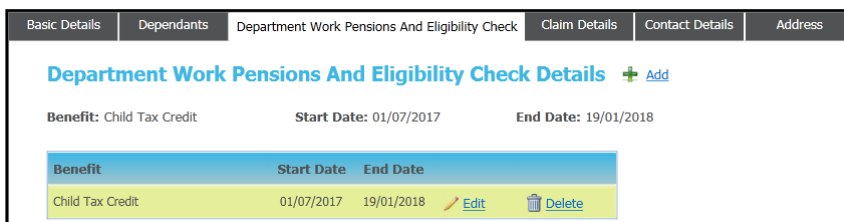
Authorisation Details [Edit](#)

Status : Pending Authorised Date : 09/10/2017 Last Updated On : 09/10/2017 Last Updated By : System Administrator

2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.



3. Select the **Department Work Pensions And Eligibility Check** tab to display the list of benefits that have been recorded for the parent/carers.



4. For the benefit record you wish to delete, click the **Delete** button to display the **Delete Department Work Pension Details** dialog.
5. Click the **Yes** button to complete the deletion.

Viewing Grants and Benefits Claim Details

All the claims with which a parent/carers is associated are displayed in the **Claims Details** tab. From here, you can view the details of a student or view specific claim applications.

1. Open an application with which the parent or career is already associated. For more information, see [Opening an Existing Application](#) on page 43.

Basic Details	Dependants	Department Work Pensions And Eligibility Check	Claim Details	Contact Details	Address					
Claim Details										
<input type="checkbox"/>	Student Name	Claim Item	Start Date	End Date	Review Date	Cost	Authorisation Status	Claim Status	Memo	Application
<input type="checkbox"/>	Hc [redacted]	Shop One	11/10/2013	01/09/2014	22/02/2014		Authorised	Current		View Application
<input type="checkbox"/>	W [redacted]	Shop One	24/11/2013	22/10/2014	02/04/2014		Authorised	Current		View Application
<input type="checkbox"/>	Hc [redacted]	FSM Primary	09/10/2017	29/11/2019	21/07/2001	1.3	Pending	Current		View Application
<input type="checkbox"/>	W [redacted]	FSM Primary	09/10/2017	29/11/2019	21/07/2001	1.3	Pending	Current		View Application
<input type="checkbox"/>	Bc [redacted]	FSM Primary	09/10/2017	29/11/2019	21/07/2001	1.3	Pending	Current		View Application
<input type="checkbox"/>	Bc [redacted]	Shop One	24/09/2013	29/05/2014	09/04/2014		Authorised	Current		View Application
<p>Batch Process + Add New Application</p>										

4. To view details of a student, click their name to display the **Person Details** dialog.
5. To view an application, click the required **View Application** hyperlink.

05 / Managing Reports

Overview

There three preconfigured Crystal reports relating to G&B. The available reports are:

- ECS BatchValidation FailedList
- ECS BatchValidation ProcessedList
- G&B Claims

Managing reports in G&B is similar to managing reports in other areas of One v4 Online. For more information on using the reports functionality, refer to one of the following reference guides:

- RG_Online_Common_Reports
- RG_Online_Reports
- RG_Online_Reports (ATBO)

ECS BatchValidation FailedList

This report lists all the records that failed validation in the ECS Batch Validation.

The data displayed in the report is from the One database and the fields **Surname**, **Date of Birth**, **NI Number** or **NASS**.

If the report is run while the DWP is still processing a batch ECS submission, the invalid records will display the error text on the **Status** column. Records with the **NotProcessed** status are valid records but are not yet processed.

If the report is run after the saving the returned results from the ECS, all the records with the **NotProcessed** status are removed and only the records that failed validation are displayed.

ECS BATCH VALIDATION - INVALID RECORDS (FAILED)						
Claim ID	Person ID	Surname	Date of Birth	NI Number	NASS	Status
65	608	P				NeitherNinoNorNas
77	649	R				NeitherNinoNorNas
64	603	P				NeitherNinoNorNas
165	2677	A		Z		NationalInsurance
106	781	W				NeitherNinoNorNas
209	4694	C	01- 1985	P		NotProcessed
188	4836	G	12- 1973	P		NotProcessed
10	434	B				NeitherNinoNorNas
14	457	P				NeitherNinoNorNas
716	8973653	b	28- 1991	Y		NationalInsurance
747	8953534	J	04- 1995	P		NotProcessed
1069	8953545	A	28- 1996	T		NationalInsurance
825	8953727	C	21- 1995			NeitherNinoNorNas
834	8953598	A	12- 1995			NeitherNinoNorNas
1052	8953534	J	04- 1995	P		NotProcessed
715	8973653	b	28- 1991	Y		NationalInsurance
742	8953549	A	24- 1994			NeitherNinoNorNas
1014	8974024	g	01- 2013			SurnameInvalid
826	8953542	A	19- 1994			SurnameInvalid

ECS BatchValidation ProcessedList

This report lists all the records that were successfully processed and have returned an eligibility status or either **NotFound** (i.e. not eligible) or **FoundAndEligible** (i.e. eligible):

ECS BATCH VALIDATION - VALID RECORDS (PROCESSED)						
Claim ID	Person ID	Surname	Date of Birth	NI Number	NASS	Status
145	2679	B	01- 1985	P		FoundAndEligible
193	3600	A	10- 1923	P		NotFound
204	588	C	01- 1985	P		FoundAndEligible
137	2669	A	01- 1985	P		NotFound
168	2679	B	01- 1985	P		NotFound
156	618	P	01- 1985	P		NotFound
700	10006343	R	01- 1985	P		NotFound
243	8889381	B	09- 1999	P		FoundAndEligible

G&B Claims

The G&B Claims report provides a list of anyone who has made a G&B related application to the LA.

Managing Reports

Claim details by Guardian

Student	Item	Start date	Status	Authorisation	End date	Review date
	TestItemCategory	01/02/2013	Current	Authorised	28/02/2013	25/09/2013

Student	Item	Start date	Status	Authorisation	End date	Review date
	Clothing	10/09/2013	Current	Pending	10/09/2013	10/09/2013
	books	28/03/2013	Current	Authorised	30/03/2013	25/09/2013

Student	Item	Start date	Status	Authorisation	End date	Review date
	FSM Primary school	10/10/2013	Current	Authorised	01/11/2013	30/10/2013

Student	Item	Start date	Status	Authorisation	End date	Review date
	BC Fund 001	03/09/2013	Current	Authorised	30/09/2013	25/09/2013

Student	Item	Start date	Status	Authorisation	End date	Review date
	suman	22/03/2013	Current	Authorised	23/03/2013	25/09/2013

06 / Appendix

One v4 Online Common Functionality

The One v4 Online version of G&B shares functionality with other One modules. For help using functionality shared with other modules, use the following resources.

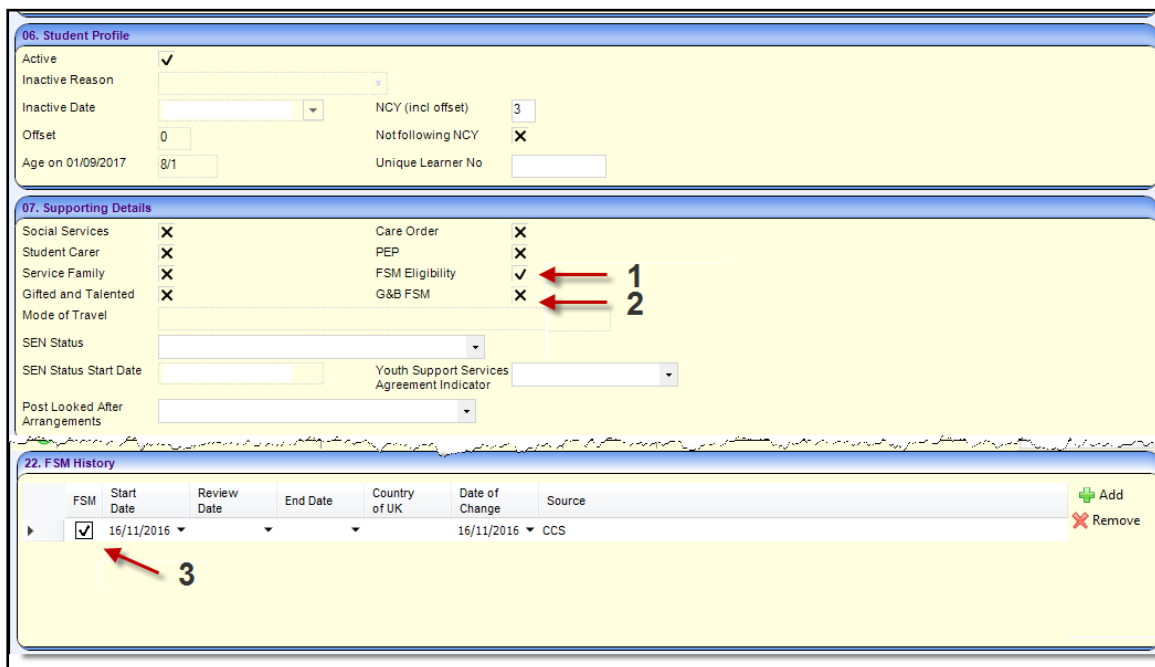
- Alerts – *Managing Alerts* topic in the v4 Online help.
- Linked Reports – *Managing Linked Reports* topic in the v4 Online help.
- Linked Documents – *Linked Documents* topic in the v4 Online help.
- Communications Log - *Maintaining the Communications Log* topic in the v4 Online help.
- SQL Query Mail Merge – *Maintaining SQL Mail Merge* topic in the v4 Online help.

FSM Data and the FSM History Scheduled Task

Overview

The Grants and Benefits module stores Free School Meals (FSM) data in the One database. This and the data is updated automatically by the FSM History scheduled task. The following sections provide more details as to where the information is stored and how and when it is updated.

The following graphic highlights the G&B FSM related fields in the **Student Details** page of the v4 Client (accessed via **Focus | People | Students | Student Enquiry**) and briefly describes how they are set.



Number	Description
1	Calculated automatically when the student record is opened, based on the data within the FSM History panel. You can also toggle the value directly. If you do so, then a new line is added in the FSM History panel. This flag is not stored in the database.

Number	Description
2	<p>If there is an FSM claim in G&B that is both authorised and current, then the <code>FSMEAL</code> field in the database is set to true and a tick is displayed here.</p> <p>If there is no valid and authorised FSM claim in G&B, then the FSM History panel is checked instead. If the current row of the FSM History panel has a tick, the <code>FSMeal</code> field in the database is set to true and a tick is displayed here.</p> <p>If neither of the above applies, then the <code>FSMeal</code> field in the database is set to false and a cross is displayed here.</p>
3	<p>Any changes you make here will affect the FSM Eligibility value in the Supporting Details panel next time you open the Student record and will affect the G&B FSM value the next time the FSM scheduled task runs.</p>

Where is FSM data stored in the One database?

EDUCATION_DETAILS.FSMEAL

The `FSMEAL` field in the `EDUCATION_DETAILS` table is included in the `STUDENT` view. It enables easy reporting on various attributes of a student. It is a flag which can be true (T), false (F) or null (empty).

This field is only updated by the FSM History scheduled task. It is an aggregation of the data held in both the `CLAIMS` table and the `CPD_FSM_HIST` table.

The `FSMEAL` field value is displayed in the **G&B FSM** check box on the **Supporting Details** panel of the **Student Details** page in the v4 Client. If the `FSMEAL` value is T, it is displayed as a tick. If it is F or null, then it is displayed as a cross.

One also maintains the `FSM_END` field in the `EDUCATION_DETAILS` table, which represents the currently expected end date of this FSM eligibility period, if known. This field is also updated by the FSM History scheduled task.

CPD_FSM_HIST.CPD_FSM

The `CPD_FSM` field contains the true (T) or false (F) flag for a given row from **FSM History** panel of the **Student Details** page in the v4 Client. For a specified child, the **FSM Eligibility** flag is set by the `CPD_FSM` field in the FSM History row of the `CPD_FSM_HIST` table that covers the current date.

For English LAs, FSM History records include a start and end date. The end date can be blank until a record with a later start date is added for the student or an end date is determined.

For non-English LA's, FSM History records include a date of change only.

This field/table can be updated manually via the **Student Details** page and by importing data from B2B or other sources.

The `CPD_FSM` field value, T or F, is displayed in two places in the v4 Client Student page; the **FSM History Panel** check box and the **FSM Eligibility** check box of the **Supporting Details** panel. If the `CPD_FSM` value is T, it is displayed as a tick. If it is F or null, it is displayed as a cross.

CLAIMS

The `CLAIMS` table contains applications made via the G&B module. Not all of these applications will be for FSM claims, an alternative example could be a school uniform grant application.

FSM History Scheduled Task

For all customers, the FSM History scheduled task updates the `FSMEAL` field on the `STUDENT` view in the One database.

For customers with a G&B v3 or G&B v4 licence, `FSMEAL` is visible in the v4 Client as the **G&B FSM** value displayed on the **Student Summary** panel of the **Student Details** page.

For customers without a G&B v3 or G&B v4 licence, the G&B FSM value/label is not displayed (as the value will match the FSM Eligibility flag after the scheduled task has been run).

The FSM History scheduled task updates slightly different information depending on whether you have a G&B licence.

The scheduled task can be set up in the v4 Client via **Tools | Administration | Scheduled Task**. FSM History can be added to a scheduled task via the **Actions** panel. This task should run once a day outside of office hours and generally after B2B:Student imports (if FSM data is set to import for your LA).

The task updates the G&B FSM flag based on the following business rules:

1. Checks if the student is active (based on the `ACTIVE` field in the `STUDENT` view).

If the student is not active, then their record will not be updated. If it is active then the task continues.

2. Checks for an FSM claim in G&B which is both authorised and current. If a particular claim meets these criteria, the `FSMEAL` field (G&B FSM flag) is set to True (a tick) and the `FSM_END` field is set to the claim end date.

If the G&B FSM flag was set to a tick on the previous line, the task stops here for that student. If the flag was not set to a tick, the task continues.

3. Checks for an FSM History record that covers the current date and has a tick/true flag against it. If a FSM History record meets these criteria, then the `FSMEAL` field (G&B FSM flag) is set to true (tick) and the `FSM_END` field is set to:

- **English LAs** - the FSM History row **End Date**
- **Non-English LAs** - NULL (empty).

If the G&B FSM flag was set to a tick on the previous line, the task stops here for that student. If the flag was not set to a tick, the task continues.

4. As none of the above conditions (other than the student being active) have been met, then the `FSMEAL` field (G&B FSM flag) is set to False (a cross) and the `FSM_END` field is set to NULL (empty).

NOTE: The difference between English and Non-English LA's in Step 3 occurs because English LAs record specific start and end dates for FSM records, while Non-English LAs only record a date of change (and so the end date is not generally known until a later date).

Index

active status	
claim category	16
claim item.....	16, 17
adding	
agencies	21
benefit claims.....	74
claim category	4
dependent to parent/carer	68
eligibility check link	18
item defaults	11
items to claim category.....	7
payment details	53
students to One database	43
agencies	
adding.....	21
editing	22
managing.....	21
applications	
deleting.....	52
grants and benefits	29, 36
opening.....	43
asylum seeker details.....	50
authorisation details	
status	52
basic details, editing.....	43
batch processing	57
benefit claim	
adding/creating.....	74
deleting	79
editing	78
viewing.....	76
cancelling	
ECS validation	65
checklist	
setting up grants and benefits	3
claim categories	
adding.....	3, 4
adding items to	7
deleting	6
editing	5
setting active/inactive status.....	16
viewing.....	5
claim details	
editing	51
claim item defaults	
deleting	15
editing	14
managing	11
claim items	
adding item defaults	11
adding/creating.....	7
deleting	10
editing	9
making active/inactive	16, 17
common functionality	87
configuring	
grants and benefits	3
serial numbering.....	26
creating	
agencies.....	21
applications	
grants and benefits	29
claim category	4
eligibility check link.....	18
grants and benefits application	29
NASS UDF	3
deleting	
applications	52
benefit claim	79
benefit claim record.....	79
claim category.....	6
claim item defaults	15
claim items	10
eligibility check link.....	21
payment details	55
dependents	
adding to parent/carer	68
multiple.....	29
setting address.....	73
viewing	71
ECS	
aborting validation	65
batch	61, 62, 72
individual	61, 72
validation failure	67
editing	
agencies.....	22
asylum seeker details	50
authorisation status.....	52
benefit claim	78
claim category.....	5
claim item defaults	14
claim items	9
eligibility check link.....	20
national insurance number.....	50
payment details.....	55
user defaults options.....	25
eligibility check link	
adding/creating.....	18
deleting.....	21
editing.....	20
FSM database	
fields	88
scheduled task	87, 88
G&B	
introduction.....	1
overview	1
grants and benefits	
permissions	2
setting up.....	3, 11, 18, 21
item defaults	
adding	11
end date	11
review date.....	11
module	
introduction.....	1
overview	1

Index

module behaviour options	
editing	24
understanding	23
NASS	3
opening	
application	43
parent/carer	
adding	
benefit details	74
dependent	68
to database	43
asylum seeker details	50
creating application	36
national insurance number	50
overview	68
viewing	
benefit claims	76
claim details	80
dependents	71
payment details	
adding/recording	53
deleting	55
editing	55
permissions	2
recording	
payment details	53
reports	
descriptions	83
introduction	83
scheduled task	
FSM	87, 88, 89
setting up	3
grants and benefits	3
NASS UDF	3
serial numbering	26
setting, dependent address	73
student claim details, viewing	55
student performer list, viewing	84
students	
adding to One	43
troubleshooting	
ECS	67
understanding	
user defaults options	25
updating	
authorisation status	52
claim details	51
multiple applications	57
user defaults options	
editing	25
understanding	25
viewing	
application	43
claim details	80
dependents	71
student claim details	55