



Free School Meals Administration

last updated for the Summer 2018 (3.66) release

Handbook

CAPITA

Revision History

Version	Published on
Summer 2018 (3.66) - 1.0	25/07/2018

Doc Ref

Free School Meals Administration Handbook/Summer 2018 (3.66)/2018-07-25

© 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 / Citizen Self Service Admin	7
Overview	7
Using this Handbook	8
What's New in this Release?	8
ECS Override Settings.....	8
02 / Managing Users.....	9
Citizen Self Service Portal Administrator	9
Logging in to One v4 Online	9
Changing a Password.....	10
Forgotten Password.....	11
Logging in to Citizen Portal Admin.....	12
The Citizen Portal Home Page	13
Home Administration Page	14
Home Local Authority Page	14
User Management (Local Authority)	15
Viewing User Details.....	15
Changing a User's email Address	15
Resetting a User's Password.....	16
03 / General Administration.....	17
Introduction to General Administration	17
Portal Configuration	18
Configuring the Site Settings	18
Configuring Password Settings.....	18
Configuring ECS Settings	19
Configuring Application Settings	20
Configuring Message Settings	22
Configuring Application Type Settings.....	23
Configuring Scheduled Task Settings.....	23
Template Management	24
Creating a Template	24
Viewing Templates.....	26
Editing a Template	27
Deleting a Template.....	27
Edit Resources.....	28
Editing Resource Descriptions.....	29
Configuring Automatic Emails.....	30
Cache	32
04 / GDPR.....	33
Introduction to GDPR.....	33

GDPR.....	33
Setting Up Questions	34
Adding a New Question	34
Publishing a Consent Statement	35
Adding a New Consent Statement.....	35
Clearing Cache	37
Configuring Email Alerts	37
Viewing Consent Withdrawals	37
Viewing Consent History.....	38
05/ Free School Meals Administration.....	41
Introduction to Free School Meals Administration	41
Creating a Dummy Base (FSM).....	42
Configuring FSM Applications.....	42
Adding Additional Questions (FSM).....	42
Editing an Existing Additional Question	44
Configuring Eligible Schools (FSM)	44
Removing Base Groups.....	46
Configuring Grants and Benefits Mappings	46
Configuring FSM Settings.....	46
Configuring Exception Settings.....	47
Configuring Portal Status Codes.....	48
Maintaining Status Codes	49
Incomplete	49
Submitted.....	49
Received	51
Maintaining Grants and Benefits Claim Codes	51
Adding a New Claim Status	51
Editing a Claim Status.....	52
06/ Applications FSM	53
Introduction to FSM Applications	53
Free School Meals Applications	53
Managing FSM Applications	53
Searching for a FSM Application	53
Reviewing FSM Applications	54
07/ Making Applications	57
Introduction to Making Applications	57
Creating an Account	58
Logging in to the Citizen Portal.....	59
Two Step Verification	60
Home Page	62
My Account	64
Personal Details.....	64

Contact Details.....	64
Change Email Address	65
Change Password.....	66
Change Secret Question	66
Change of Circumstances	67
Two Step Verification	67
Consent History	69
Withdraw Consent.....	69
My Family.....	70
Adding a Child.....	70
FSM Applications	71
Making a Free School Meals Application.....	71
Interpreting the Qualifier Codes.....	75
Messages.....	76
Index	78

01 / Citizen Self Service Admin

Overview

The One Citizen Self Service portal is a secure online gateway provided by the Local Authority enabling users to apply for the following services:

- 30 Hour Entitlement
- Courses
- Free School Meals
- Two Year Old Funding
- School Places
- Special Educational Needs and Disabilities
- Transport.

These applications are then transferred into One for loading into the appropriate modules:

Citizen Self Service Portal	One
30 Hour Entitlement	Early Years v4
Courses	Training Manager v4
Free School Meals	Grants and Benefits v4
Funded Early Education for 2 year olds	Early Years v4
School Places	Admissions and Transfers v4
Special Educational Needs and Disabilities	SEND v4
Transport	Transport v4

For local authorities, it enables staff to easily match information supplied via the portal to data already held in the Capita One database. Local authority staff can interactively match records and resolve conflicts with people data, removing the need to import and process data manually.

The Citizen Portal Admin functionality is available to Local Authorities in One v4 Online, subject to a licence and v4 Client permissions. The Citizen Portal Admin enables local authority teams to view filtered lists of the portal applications and the details of each application.

NOTE: Throughout the Citizen Self Service portal, clicking in a field displays a tooltip containing information on the selected field. Tooltips are managed via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title**.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the **One Publications** website via the **Technical** link.

Using this Handbook

This handbook is intended for One Administrators at the Local Authority. It describes the following administration processes performed by the authority:

- Administration
 - General Administration
 - Portal Configuration
 - Template Management
 - Configurable Question Library
 - Edit Resources
 - Cache
 - Free School Meals Administration
 - Additional Questions
 - Eligible Schools
 - Grants & Benefits Mapping
 - Portal Status Codes
- GDPR Administration
 - Configurable Question Library
 - GDPR Consent Statements
 - Cache
 - GDPR Email Alert Configuration
 - GDPR Consent Withdrawals
 - GDPR Consent Histories
- Local Authority
 - View All Applications
 - User Management.

At the end of this handbook, there is a section explaining how the parent, carer or guardian makes an application. For more information, see [Introduction to Making Applications](#) on page 57.

What's New in this Release?

ECS Override Settings

For the One Summer 2018 release (3.66), the **ECS Settings** have been modified.

More Information:

Configuring ECS Settings on page 19.

02 / Managing Users

Citizen Self Service Portal Administrator

In order to be a Citizen Self Service Portal administrator, you must satisfy the following conditions:

- In One v4 Client:
 - be set up as a user.
 - have a valid email address.
 - belong to a group.
 - you need group permissions to be set.
- In One v4 Online:
 - your LA must have a Citizen Portal licence key.

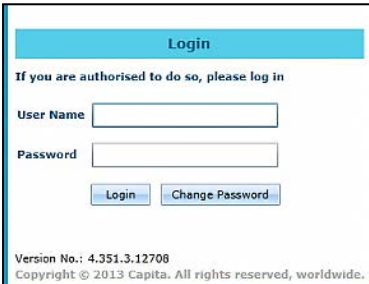
More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the One Publications website via the Technical link.

Logging in to One v4 Online

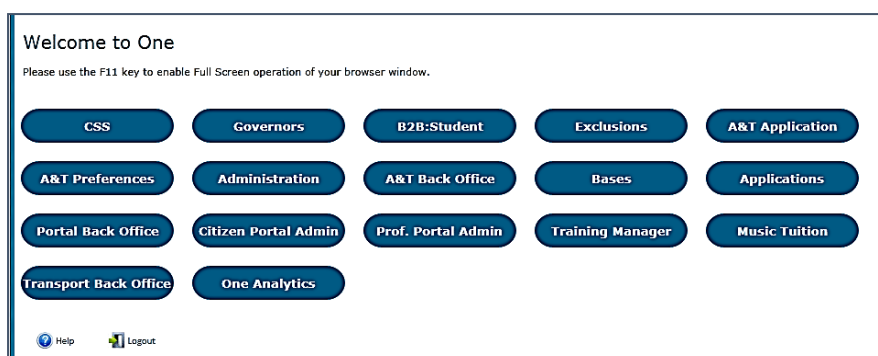
To log in to One v4 Online, you need to obtain a licence key for the required v4 Online module from Capita. You must also be set up as a user in One v4 Client.

1. Open the **Login** screen by clicking the link to the One Online web server, set up by your System Administrator.



2. Enter your **User Name**; this is the same as your v4 Client user name.
3. Enter your **Password**; this is the same as your v3 password. Passwords are case sensitive. To change your password, see [Changing a Password](#) on page 10.
4. Click the **Login** button to display the **Welcome to One** page.

Managing Users



The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

More Information:

RG_Online_Administration_Login_Logout available from the **One Publications** website via the **Reference Guides** link and **My Account**.

Changing a Password

To change your password in v4 Online:

1. Click the **Change Password** button on the **Login** screen to display the **Change Password** dialog.

2. On the **Change Password** dialog, enter your **Old Password**.
3. Enter your **New Password**.
4. Enter your new password again in the **Confirm New Password** field.
5. Click the **OK** button.

More Information:

RG_Online_Administration_Login_Logout available from the **One Publications** website via the **Reference Guides** link and **My Account**.

Forgotten Password

If you have entered an incorrect email address or password, the following message is displayed:

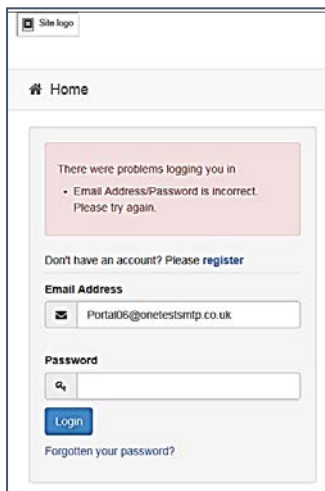
There were problems logging you in.

Email Address/Password is incorrect.

Please try again.

Check that you have entered the correct email address.

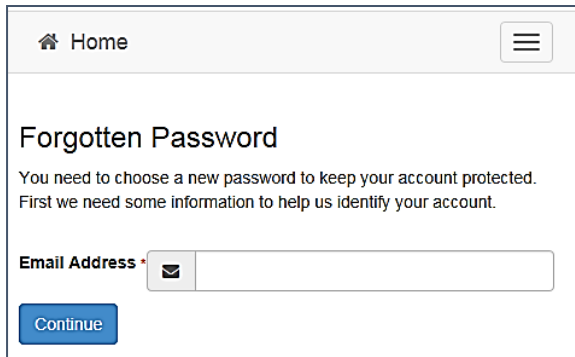
If you have forgotten your password, it will need to be reset.



The screenshot shows a login page with a red error message box at the top. The message reads: "There were problems logging you in" followed by a bullet point: "• Email Address/Password is incorrect. Please try again." Below the message, there is a link: "Don't have an account? Please register". The login form contains an "Email Address" field with the value "Portia06@onetestsmtip.co.uk" and a "Password" field. A "Login" button is visible, and a link "Forgotten your password?" is located below the password field.

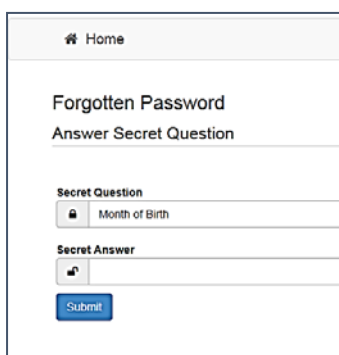
To reset a password:

1. Click the **Forgotten your password?** link to display the **Forgotten Password** dialog.



The screenshot shows the "Forgotten Password" dialog. It has a title "Forgotten Password" and a subtitle "You need to choose a new password to keep your account protected. First we need some information to help us identify your account." Below this, there is an "Email Address" field with an envelope icon and a "Continue" button.

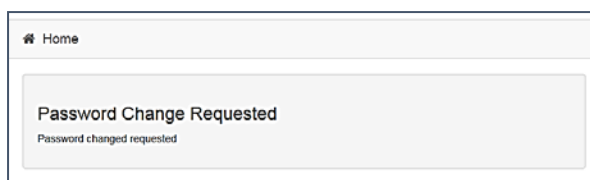
2. Enter your email address, then click the **Continue** button to display the **Secret Question** dialog.



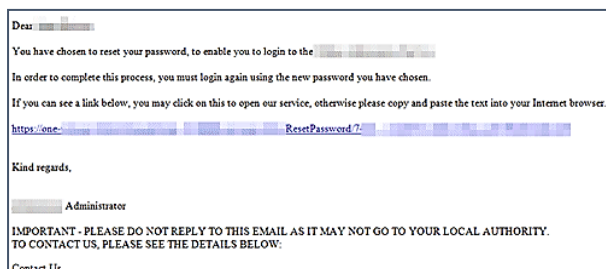
The screenshot shows the "Answer Secret Question" dialog. It has a title "Forgotten Password" and a subtitle "Answer Secret Question". Below this, there is a "Secret Question" field with a lock icon and the text "Month of Birth". Below that is a "Secret Answer" field with a lock icon. A "Submit" button is at the bottom.

3. Enter the **Secret Answer** you provided when registering, then click the **Submit** button. A message informs you that a password change has been requested.

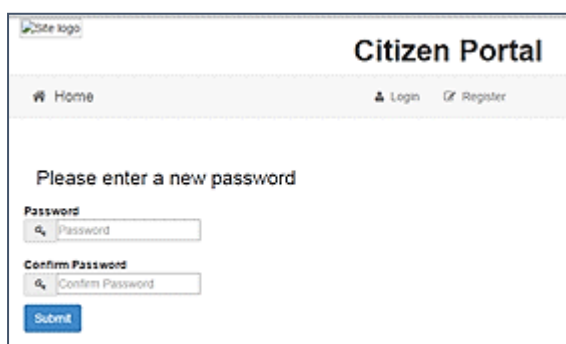
Managing Users



The Local Authority will send an email, similar to the one below, to the registered email address.



4. Click on the link in the email to access the Citizen Portal website.



5. Enter your new **Password**. Passwords are case sensitive.
6. Enter your new password again in the **Confirm Password** field.
7. Click the **Submit** button. A message confirms that you have successfully changed your password.



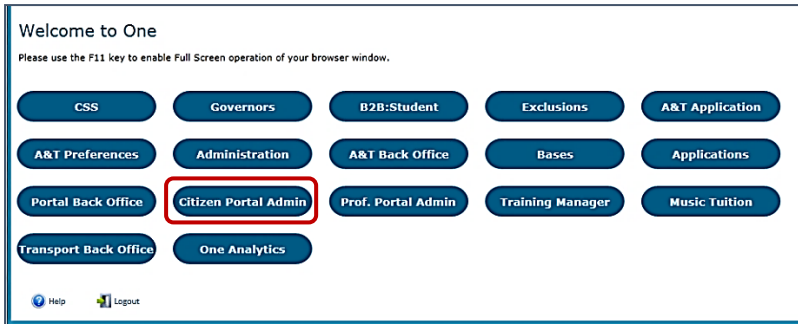
8. Click the **Login** button to log in to the Citizen Portal with your new password.

Logging in to Citizen Portal Admin

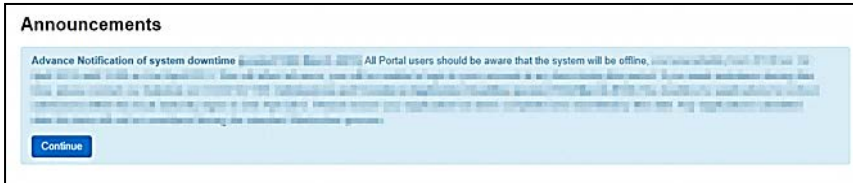
The **Citizen Portal Admin** functionality is available in One v4 Online. To use the Citizen Portal Admin you must have an email address, be set up as a user and belong to a user group in One v4. Your System Administrator will have set up the Citizen One Portal licence key and your permissions via **v4 Client | Tools | Permissions | User Group Permissions**.

To log in to the One Citizen Self Service Portal Admin:

1. Log in to v4 Online. For more information see [Logging in to One v4 Online](#) on page 9.



- Click the **Citizen Portal Admin** button to display the **Announcements** page.



The **Announcements** page displays only if there are announcements regarding the portal.

- Click the **Continue** button to display the **Home** page.

The Announcements page is edited via Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks.

Announcements	Placeholder_Title
Announcement Start Date	Placeholder_Forename
Announcements End Date	Placeholder_Surname

NOTE: If there are no announcements, clicking the **Citizen Portal Admin** button displays the **Home** page.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the **One Publications** website via the **Technical** link.

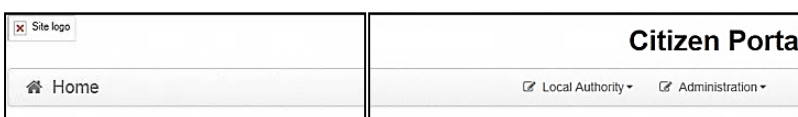
The Citizen Portal Home Page

The **Citizen Portal Home** page is divided into the following two sections:

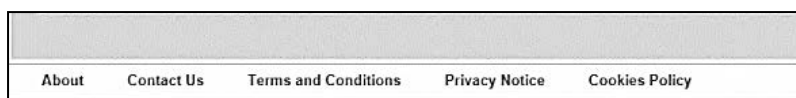
- **Administration** – for more information, see the [Home | Administration Page](#) section on page 14.
- **Local Authority** – for more information, see the [Home | Local Authority Page](#) section on page 14.

These can be accessed by clicking on the buttons or selecting an option on the navigation bar.

The Citizen Portal header displays the site logo. This is installed by the System Administrator when installing the Citizen Self Service portal.



The Citizen Portal footer displays the following links:



- **About** – displays information about the local authority. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_About**.
- **Contact Us** – displays contact details such as address, phone numbers and email address. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_Contact**.
- **Terms and Conditions** – displays the terms and conditions for using the Citizen Self Service Portal. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_TAndC**.
- **Privacy Notice** – displays additional information regarding privacy. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_PrivacyNotice**.
- **Cookies Policy** – displays information regarding the cookies that are placed on the user's computer when logging in to the portal. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_CookiesPolicy**.

Home | Administration Page

The **Administration** page is accessed via **v4 Online | Citizen Portal Admin | Home | Administration**.

The **Home Administration** page enables the following administration processes to be performed by the local authority:

- Free School Meals Administration
- Home to School Transport Administration
- School Places Administration
- General Administration.

Home | Local Authority Page

The Local Authority page is accessed v4 Online via **Citizen Portal Admin | Home | Local Authority**.

From here the administrator can manage applications and users.

Clicking the **View All Applications** button displays the **Applications** browse list. For more information, refer to the following handbooks:

- Free School Meals Administration Handbook – the section on *Introduction to FSM Applications*.
Clicking the **User Management** button displays the **User Management** page. For more information, see [User Management \(Local Authority\)](#) on page 15.

User Management (Local Authority)

The User Management page enables the administrator to view user details and to change their email address and password.

The screenshot shows the 'User Management' page for 'Local Authority'. It features a search bar with the text 'Enter part of First Name, Surname Or Email Address' and a search button. Below the search bar, it indicates '247 Records Found' and provides pagination controls. A table displays the search results with columns for Email Address, First Name, Surname, Confirmed status, View Details, and Action.

Email Address	First Name	Surname	Confirmed	View Details	Action
[Redacted]	[Redacted]	[Redacted]	✓	View Details	Change Email Address Reset Password
[Redacted]	[Redacted]	[Redacted]	✓	View Details	Change Email Address Reset Password
[Redacted]	[Redacted]	[Redacted]	✓	View Details	Change Email Address Reset Password
[Redacted]	[Redacted]	[Redacted]	✓	View Details	Change Email Address Reset Password
[Redacted]	[Redacted]	[Redacted]	✓	View Details	Change Email Address Reset Password

NOTE: If there are any errors reported when changing an email address or password, the record must be changed in One v3.

Viewing User Details

To view a user's details:

1. Select **v4 Online | Citizen Portal Admin | Home | Local Authority | User Management** to display the **User Management Search** dialog.
2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of local users that have registered for the One Citizen Self Service portal.
3. Click the **View Details** link to display the **View Users Details** dialog. Details are displayed for Claimant, Children and Applications. You cannot make any changes.
4. Click the **Back** button to return to the **User Management** page.

Changing a User's email Address

To change a user's email address:

1. Select **v4 Online | Citizen Portal Admin | Home | Local Authority | User Management** to display the **User Management Search** dialog.
2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of users that have registered for the One Citizen Self Service portal.
3. Click the **Change Email Address** link to display the **Confirm Email Update** dialog. You are asked to confirm that you are resetting the email address for the correct account.
4. Enter the **New Email Address**.
5. Confirm the **New Email Address**.
6. Click the **Continue** button to return to the **User Management** page.

Resetting a User's Password

To reset a user's password:

1. Select **v4 Online | Citizen Portal Admin | Home | Local Authority | User Management** to display the **User Management Search** dialog.
2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of users that have registered for the One Citizen Self Service portal.
3. Click the **Reset Password** button to display the **Confirm Password Reset** dialog. You are asked to confirm that you are resetting the password for the correct account.
4. Click the **Continue** button to return to the **User Management** page.

03 / General Administration

Introduction to General Administration

The General **Administration** page is accessed via **One v4 Online | Citizen Portal Admin | Home | Administration**.



The **General Administration** panel enables you to perform the following tasks:

- **Portal Configuration** – configure the general application settings used by the portal. For more information, see the following sections:
 - [Portal Configuration](#) on page 18.
 - [Configuring the Site Settings](#) on page 18.
 - [Configuring Password Settings](#) on page 18.
 - [Configuring ECS Settings](#) on page 19.
 - [Configuring Application Settings](#) on page 20.
 - [Configuring Message Settings](#) on page 22.
 - [Configuring Application Type Settings](#) on page 23.
 - [Configuring Scheduled Task Settings](#) on page 23.
- **Template Management** – create, change or remove templates used within the messages. For more information, see the following sections:
 - [Template Management](#) on page 24.
 - [Creating a Template](#) on page 24.
 - [Viewing Templates](#) on page 26.
 - [Editing a Template](#) on page 27.
 - [Deleting a Template](#) on page 27.
- **Configurable Question Library** – set up and manage a library of questions to be used in the One A&T module.
- **Edit Resources** – edit site texts and contents. For more information, see the following sections:

- [Edit Resources](#) on page **Error! Bookmark not defined.**
 - [Editing Resource Descriptions](#) on page 29.
- **Cache** – see which data is cached and clear the cache. For more information, see the following section:
- [Cache](#) on page 32.

Portal Configuration

An Administrator, with the appropriate permissions, can edit the Portal Configuration settings, thus changing the setup and the behaviour of the Citizen Self Service portal.

The **Portal Configuration** functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration**. Click the **Portal Configuration** button to display the **Site Settings** page.

For more information, see [Configuring the Site Settings](#) on page 18 and the *Technical Guide - Deploying and Configuring the One Citizen Self Service Portal for Local Authorities*, available on the One Publications website.

More Information:

Deploying and Configuring the One Citizen Self Service Portal for Local Authorities technical guide, available from the **One Publications** website via the **Technical** link.

Configuring the Site Settings

The **Site Settings** pages are accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration**. From here you can configure the following settings:

- Password Settings
- ECS Settings (Eligibility Checking Service)
- Application Settings
- Message Settings
- Application Type Settings
- Scheduled Task Settings.

Configuring Password Settings

The **Password Settings** panel is used to set the security settings applied to users during registration and login.

To configure the password security settings:

1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **Password Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Password Settings

Configure Security Settings

- Minimum password length: 8
- Maximum password length: 15
- Minimum digits in password: 2
- Minimum number of lower case characters: 1
- Minimum number of upper case characters: 1
- Forgotten password check period: 15
- Forgotten password attempts: 3
- Locked account forgotten password check period: 180

3. Click the **Save** button.

Configuring ECS Settings

The **ECS (Eligible Checking Service) Settings** panel is used to store the credentials and information used for connection to the Department for Work and Pensions (DWP) online checking service.

To configure the ECS settings:

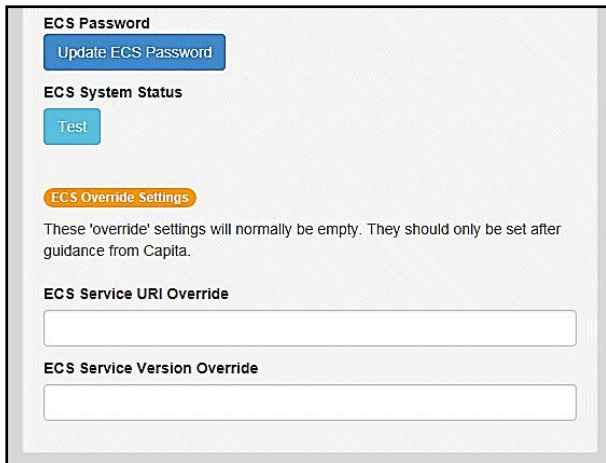
1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **ECS Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

ECS Settings

Configure the link to the DWP Eligibility Checking Service

- ECS Mock Eligibility Status**: Eligible
- ECS Mock Error Status**: Success
- ECS Environment**: Mock
- ECS Local Authority**: [Text field]
- ECS Username**: [Text field]

General Administration



The screenshot shows a web interface for ECS settings. It includes a section for 'ECS Password' with an 'Update ECS Password' button. Below that is the 'ECS System Status' section with a 'Test' button. The 'ECS Override Settings' section contains a note: 'These 'override' settings will normally be empty. They should only be set after guidance from Capita.' There are two text input fields: 'ECS Service URI Override' and 'ECS Service Version Override'.

3. To change your ECS Password, click the **Update ECS Password** button to display the **Update ECS Password** dialogue.
4. Enter the new password.
5. Confirm the new password.
6. To view the **ECS System Status**, click the **Test** button. An information message is displayed from the webpage.
7. Enter the following URL into the **ECS Service URI Override** field:
<https://ecs.education.gov.uk/fsm.laweb/service/20170701/OnlineQueryService.svc>
8. Enter information into **ECS Service Version Override** only if you have received guidance from Capita One.
9. Click the **Save** button
10. Reset the Portal application to re-load the changes (either IIS Reset, or re-cycle the Application Pool running the Portal application).

Configuring Application Settings

The **Application Settings** panel stores the settings used when submitting applications via the Citizen Self Service portal.

To configure the application settings:

1. Select One v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings.
2. On the Application Settings panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Application Settings

Configure Application Settings

Admissions Online URL

Free School Meals application prefix

Free School Meals dummy base id

Transport application prefix

Transport dummy base id

Permitted Titles

Permitted Relationships

School Place application Permitted Faiths

Two Year Old Funding Application Prefix

Two Year Old Funding Placement Prefix

2 Year Old Funding Dummy Base Id

2 Year Old Funding application reference UDF field name

2 Year Old Funding application second applicant UDF field name

The current school base group

Training Manager Schools base group

SEND Dummy Base Id (Shared with Professional Portal)

SEND Form Submission Notification Email Addresses

3. Click the **Save** button.

Configuring Message Settings

The **Message Settings** panel holds the values used when sending and displaying messages from the Citizen Self Service portal.

To configure the message settings:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **Message Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Message Settings
Configure Message Settings

From address for outbound messages

Pre-configured email address

2 Year Old Funding Voucher Message Template

2 Year Old Funding Ineligible Message Template

2 Year Old Funding Move into area Voucher Template.

2 Year Old Funding late moving voucher template

SEND Parent/Carer Accept Message Template

SEND Parent/Carer Reject Message Template

SEND Parent/Carer Request Info Message Template

SEND Young Person Accept Message Template

SEND Young Person Reject Message Template

SEND Young Person Request Info Message Template

The Portal url

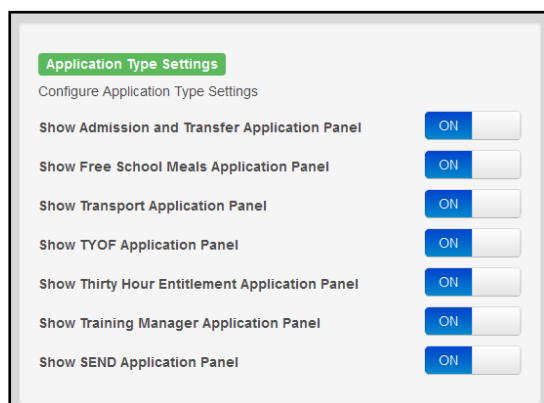
3. Click the **Save** button.

Configuring Application Type Settings

The **Application Type Settings** panel controls the availability of the panels on the parents, guardians, carers and young people's **Home** page.

To configure the application type settings:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **Application Type Settings** panel toggle the panels **ON** or **OFF** as required. Click in a field to display the relevant tooltip.



Label	Toggle
Show Admission and Transfer Application Panel	ON
Show Free School Meals Application Panel	ON
Show Transport Application Panel	ON
Show TYOF Application Panel	ON
Show Thirty Hour Entitlement Application Panel	ON
Show Training Manager Application Panel	ON
Show SEND Application Panel	ON

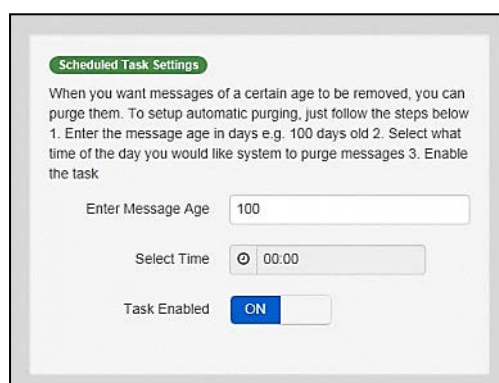
3. Click the **Save** button.

Configuring Scheduled Task Settings

The **Scheduled Task Settings** panel is used to control the task that removes old messages from the One database. Although you can control some options for the Scheduled Task from here, the task must first be set up in the One v4 Client.

To configure the scheduled task settings:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **Scheduled Task Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.



When you want messages of a certain age to be removed, you can purge them. To setup automatic purging, just follow the steps below

1. Enter the message age in days e.g. 100 days old
2. Select what time of the day you would like system to purge messages
3. Enable the task

Enter Message Age:

Select Time:

Task Enabled:

3. Click the **Save** button.

NOTE: These settings only affect the Citizen Self Service portal; they do not affect Scheduled Tasks set up in One v4 Client.

Template Management

The **Template Management** functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Template Management**. Templates are used to send notifications to the parent, guardian or carer to provide information regarding their application, or to inform them that changes have been made to their application.

In **Template Management** you can create, edit or remove templates stored within the portal. Placeholders can be inserted into the subject or the body of the template for the following entities:

- Title
- Forename
- Surname
- Business Phone
- Mobile Phone
- Home Phone.

The placeholders are edited via **Administration | General Administration | Edit Resources | Resource Configuration Title | Administration**.

Title	Placeholder_Title
Forename	Placeholder_Forename
Surname	Placeholder_Surname
Business Phone	Placeholder_BusPhone
Mobile Phone	Placeholder_Mobile
Home Phone	Placeholder_HomePhone

Creating a Template

To create a new template:

1. Select **One v4 Online | Citizen Portal Admin | Administration | General Administration | Template Management**.
2. Click the **Create Template** button to display the **Create Template** page.
3. Enter the **Template Name**.
4. Enter the **Subject** of the template.
5. If you wish to add a placeholder to the subject, click the **Add To Body** button to change it to **Add To Subject**, then choose one of the **Insert Placeholder** options.

The screenshot shows the 'Create Template' form in the Administration section. It features a 'Template Name' input field, a 'Subject' dropdown menu, and a 'Message' text area with a rich text editor toolbar. The toolbar includes buttons for undo, redo, bold, italic, bulleted list, numbered list, link, unlink, and text color. A 'How to Format' link is also present. Below the message field are buttons for 'Add To Subject' and 'Insert Placeholder'. At the bottom, there are 'Cancel' and 'Save' buttons.

6. Enter your text into the **Message** box. Alternatively click the **Add To Subject** button to change it to **Add To Body**, then choose one of the **Insert Placeholder** options.
7. Use the buttons at the top of the **Message** field to format your message. Your formatted message is displayed in the **Preview** field.

The buttons apply **Markdown** formatting, a text-to-HTML conversion tool for web writers. For more information, click the **How to Format** button.

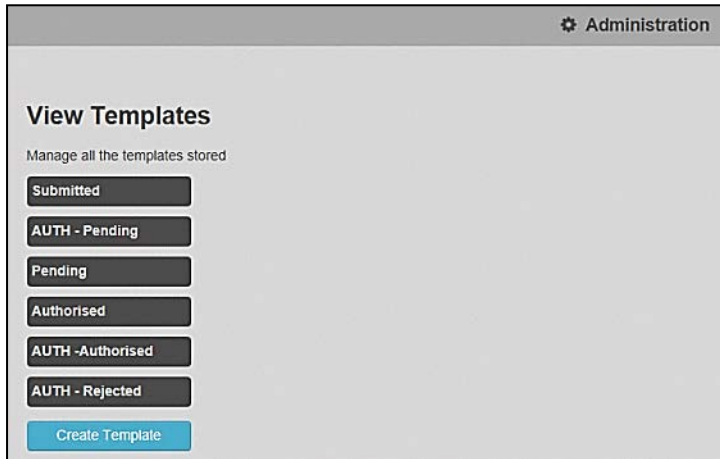
This screenshot shows the 'Create Template' form with the 'Message' field populated with formatted text. The text includes a header, a salutation with placeholders, and italicized text. The 'Preview' field shows the rendered output of this text, including a large header, the salutation, and italicized text. The 'Add To Subject' button has been changed to 'Add To Body'. The 'Save' button is highlighted in blue.

8. Click the **Save** button to close the page and return to the **View Templates** page.

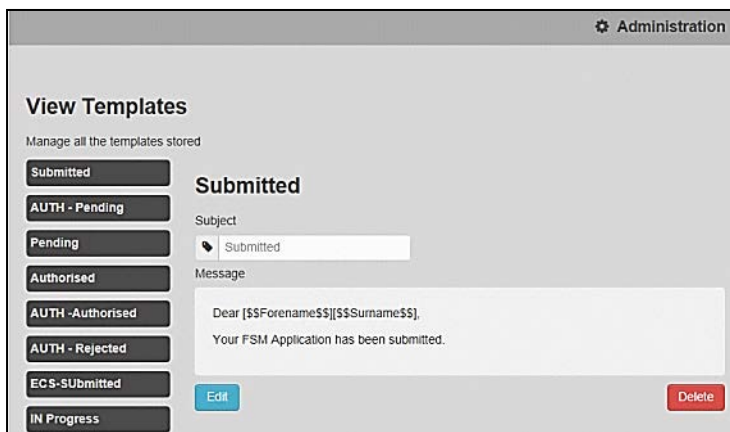
Viewing Templates

To view an existing template:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Template Management** button to display the **View Templates** page; existing templates are displayed.



2. Click the template name to display the **Subject** and **Message** that are to be used in the message.



Editing a Template

To edit an existing template:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Template Management | View Templates**.
2. Select the required template then click the **Edit** button to display the **Edit Template** dialog.

Edit Template

Template Name
 Template 1

Subject
 [\$Forename][\$Surname]

Message
 Add To Body Insert Placeholder

Dear [Title][Surname]
 Thank you for your application form.
 Kind Regards
 Beds CC

Preview
 Dear [Title][Surname] Thank you for your application form.
 Kind Regards Beds CC

Cancel Save

3. Edit the required fields; all of the fields on the **Edit Template** dialog can be edited.
4. Click the **Save** button.

Deleting a Template

To delete an existing template:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Template Management** button to display the **View Templates** page.

Administration

View Templates

Manage all the templates stored

Submitted

AUTH - Pending

Pending

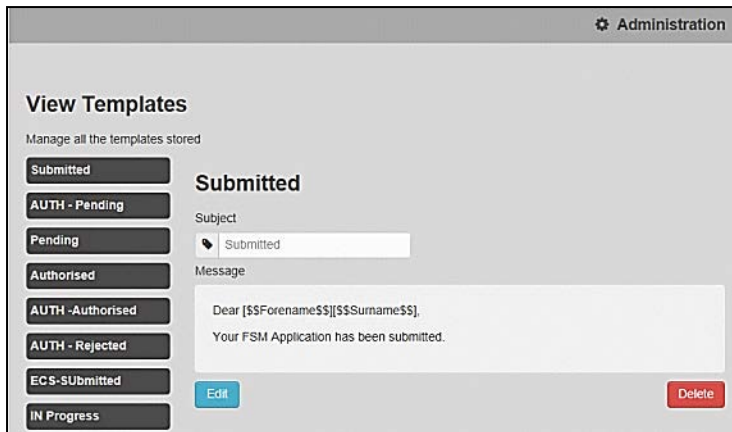
Authorised

AUTH - Authorised

AUTH - Rejected

Create Template

2. Click the template name to display the **Subject** and **Message** that are to be used in the message.



3. Click the **Delete** button to remove the stored template; you must confirm the deletion.

Edit Resources

The **Edit Resources** functionality is accessed via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources**. From here you can edit the contents of the portal. The information in the tooltips is stored in the resource descriptions.

The following **Resource Configuration Descriptions** can be edited:

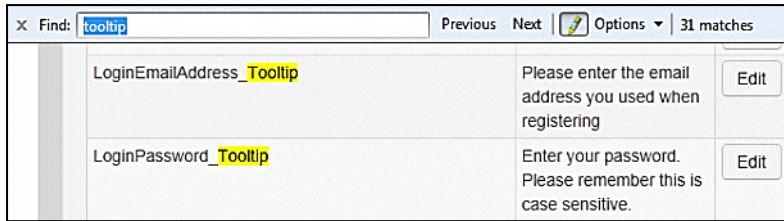
Text Resources

- Account
- Administration
- Admissions
- Citizen Thirty Hours Entitlement
- Free School Meals
- Home
- Home Tiles
- Local Authority
- Messaging
- SEND
- Shared
- Training Manager
- Transport
- Two Year Old Funding.

Markdown

- Text Blocks

To find a particular resource description, open one of the **Resource Configuration Descriptions** then use the **Ctrl + F** keys on your keyboard to display the **Find** dialog. The entered text is highlighted on the page.



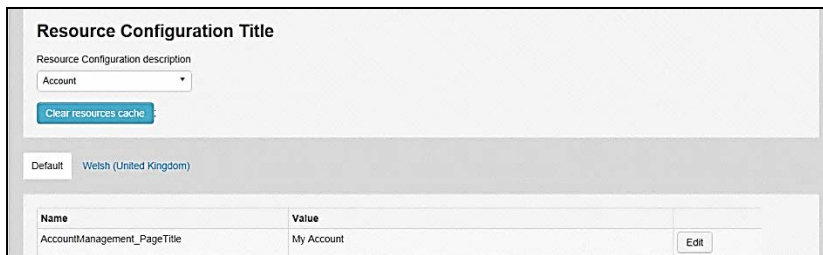
NOTE: You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.

Editing Resource Descriptions

The resource descriptions are individual dialogs that enable you to manage the text that is available to users in many areas of the Citizen Self Service portal. If a **Resource Value** is changed via the **Edit Resource Title** dialog, then the next time a user sees that resource, the text will be updated to reflect the change.

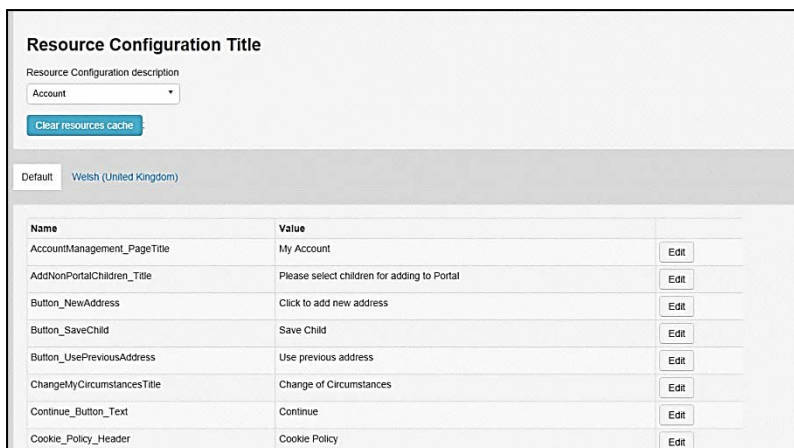
To edit the resource descriptions:

1. Select **Administration | General Administration | Edit Resources** to display the **Resource Configuration Title** page.

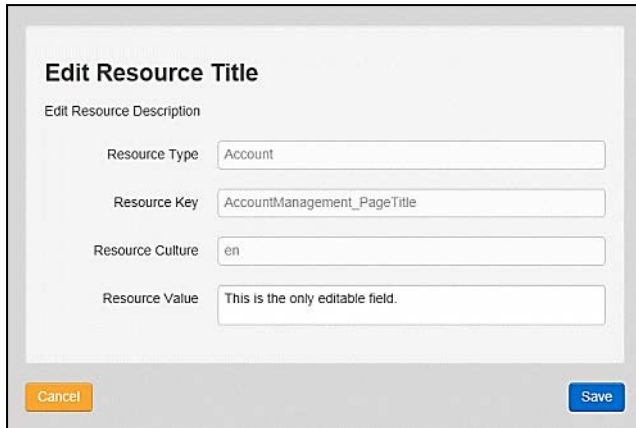


The default option is English (en). Click the **Welsh (United Kingdom)** button to display the Welsh (cy-GB) descriptions.

2. Select an area from the **Resource Configuration Description** drop-down to display the Descriptions and Values associated with the resource types.



3. Click one of the **Edit** buttons next to a **Value** to display the **Edit Resource Title** dialog.



The following fields are read-only:

- **Resource Type** – the name of the resource configuration title.
 - **Resource Key** – the resource database name.
 - **Resource Culture** – en (English) or cy-GB (Welsh)
4. Enter your text in the **Resource Value** field.
 5. Click the **Save** button to return to the **Resource Configuration Title** page to continue editing the resource descriptions.

Configuring Automatic Emails

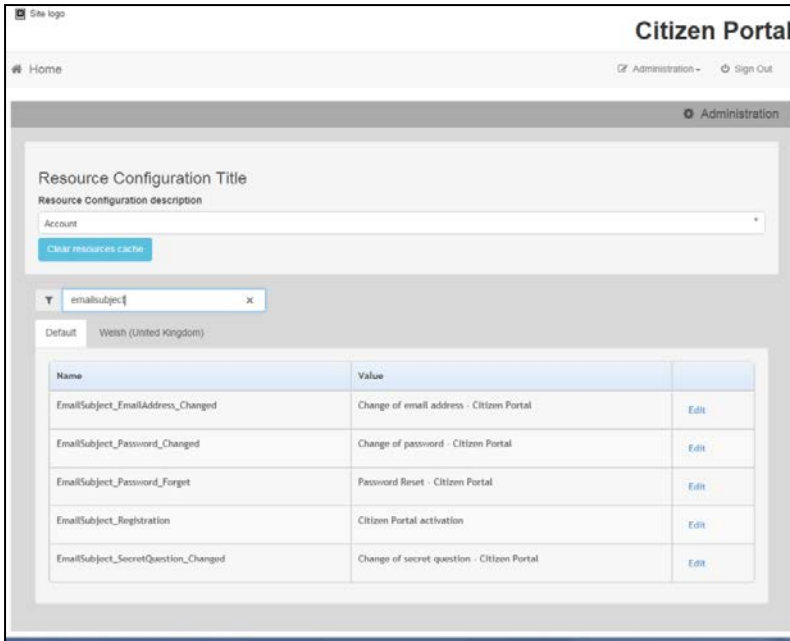
Portal administrators can now configure the text included with automatic emails, sent in response to the following actions in both the One Citizen Portal and the One Professional Portal:

- User indicates that they have forgotten their password.
- User changes their password.
- User changes their email address.
- User changes their secret question.
- Administrator resets a user's password (system sends forgotten password email to user).
- Administrator changes a user's email address (system sends a changed email address confirmation to user).

Note: Different text can be configured for the One Citizen Portal and the One Professional Portal versions of these emails.

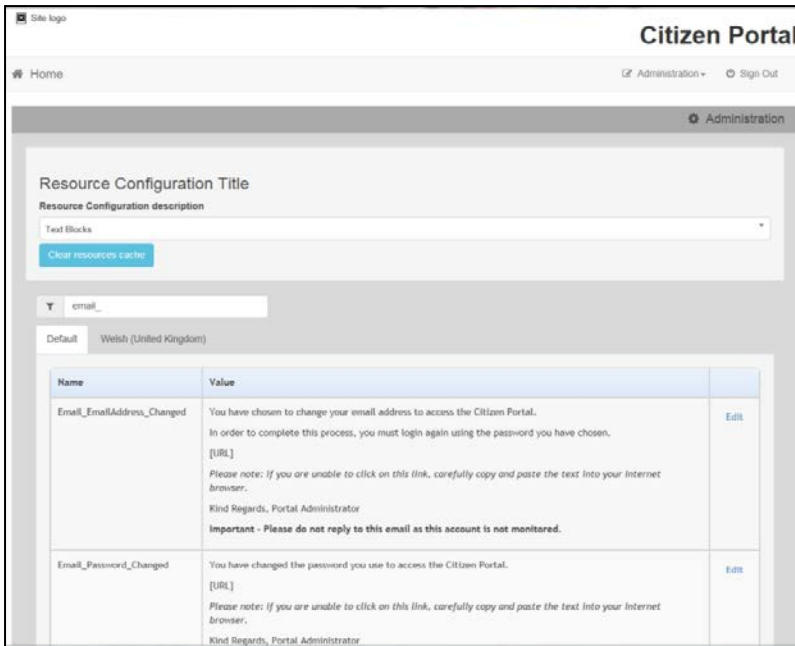
This text can be configured by the portal administrator via **Citizen Portal Administration | Administration | Edit Site Texts | Resource Configuration Title | Text Resources | Account**. Default text has been automatically configured for each.

To configure the subject lines for the different email types, type *emailsubject* into the **Search** box to filter the resource list to display the new configurable email subject items.



To configure the contents for the different email types, select **Citizen Portal Administration | Administration | Edit Site Texts | Resource Configuration Title | Markdown | Text Blocks**. Default text has been automatically configured for each.

Type *email_* into the **Search** box to filter the list to display the new configurable content items for the different email types.



The configurable text block resource names are:

- Email_EmailAddress_Changed
- Email_Password_Changed
- Email_Password_Forget
- Email_Registration
- Email_SecretQuestion_Changed.

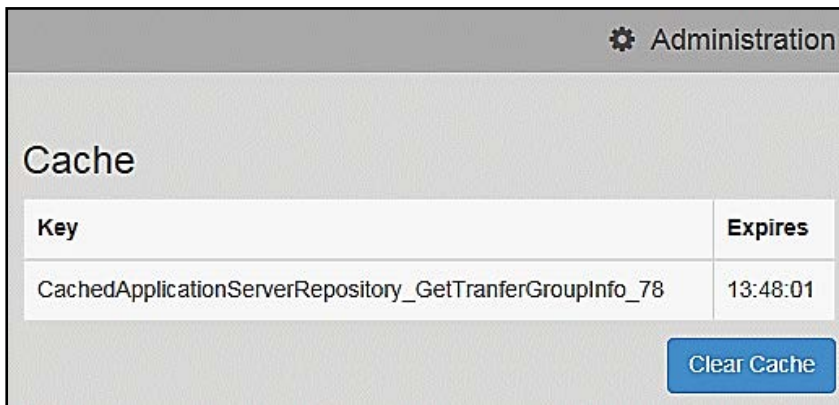
Cache

The cache is a temporary storage area used to speed up the retrieval of system information. The One system caches information that can take a long time to retrieve or require a large amount of memory. Sometimes issues can occur if the cached data is not updated when new data is entered into One. For example, a new transfer group has been added in One, but is not displaying in the Citizen portal. Clearing the cache forces a data refresh and displays the new data as expected.

The Cache page enables you to see which data is cached; cached data can be cleared from the system.

To clear the cache:

1. Select **Administration | General Administration | Cache** to display the list of cached items.



2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.
3. Click the **Save** button.

04 / GDPR

Introduction to GDPR

GDPR

GDPR Administration is used to set up and manage GDPR consent. It is accessed via the **GDPR Administration** menu route or by clicking the **GDPR Administration** tile on the Citizen portal home page.

 **GDPR Administration**

Click on the tiles shown below to manage GDPR.

Configurable Question Library

Set up and manage a library of questions to be used in One modules

GDPR Consent Statements

Manage the publication of different versions of the GDPR Consent Statement.

Cache

See which data is cached and clear the cache

GDPR Email Alert Configuration

Configure the email addresses to be notified when a Citizen withdraws consent.

GDPR Consent Withdrawals


View details of people who have withheld or withdrawn GDPR consent.

GDPR Consent Histories

View the consents that a user has agreed to.

You can only access the **GDPR Administration** area if you have **Read-Write** permission for the **GDPR Administration** business process as shown in the following graphic:

Permissions Editor [CitizenAdmin-CitizenAdmin]

 Save

01. Main Processes

Main Business Processes: Citizen Portal

02. Business Processes

Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Citizen Portal		✓		
Administration		✓		
Free School Meals		✓		
GDPR Administration		✓		
Portal Admin Access	✓			
Thirty Hour Entitlement User		✓		
Transport		✓		
User Management		✓		

Permissions are set up in the v4 Client via **Tools | Permissions**.

Setting Up Questions

The **Configurable Questions Library** page enables you to set up the questions to be included in consent statements. Consent statements are used to request agreement from a citizen to hold and process their personal data.

The page is accessed via **GDPR Administration | Configurable Question Library**.

The screenshot shows the 'Configurable Questions Library' page. At the top right, there is a gear icon and the word 'Administration'. Below this is a header section with the title 'Configurable Questions Library' and a paragraph of introductory text. A dropdown menu is set to 'GDPR Consent Statement'. Below the dropdown is a table with the following structure:

Consent Agreement Text	Statement Text	Active?	Action
I agree to the above usage policy	**GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse...	Yes	Edit Preview (English) Preview (Welsh)
Rwy'n cytuno â'r polisi defnydd uchod	**GDPR Consent Statement (Welsh) March 2018** Lorem ipsum dolor eistedd amet, adipiscing elit consectetur. Mae ffiniau fy Tempus risus sem. Etiam sollicitudin laoreet disgwylir, id laoreet Rhannwch...		
I agree to the above usage policy	**GDPR Consent Statement March (V2) 2018** ----- **Version 2** ----- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoree...	Yes	Edit Preview (English) Preview (Welsh)
Rwy'n cytuno â'r polisi defnydd uchod	**GDPR Consent Statement (Welsh) March (V2) 2018** ----- **Fersiwn 2** ----- Lorem ipsum dolor eistedd amet, adipiscing elit consectetur. Mae ffiniau fy Tempus risus sem. Etiam s...		

At the bottom left is an orange 'Back' button, and at the bottom right is a blue 'Add new tick box question' button.

Adding a New Question

You can add a new question and save it in the Configurable Questions Library. The text can be previewed to see how it will be displayed to a user.

1. Select **GDPR Administration | Configurable Question Library** to display the **Configurable Questions Library** page.
2. Ensure that **GDPR Consent Statement** is selected from the drop-down.
3. Click the **Add new tick box question** button to display the **Tick Box Question Editor** window.

4. Enter the **Statement Text** (in either English or Welsh). This text is presented to the Citizen portal user and comprises the Consent Statement..
5. Enter the **Consent Agreement Text** (in either English or Welsh), This is the question text that is presented to the user with a tick box asking them to agree that their personal data is held in accordance with the contents of the Consent Statement.
6. If required, click the **Make this question active** button.
7. If required, click the **Preview (English)** or **Preview (Welsh)** button.
8. Click the **Save** button.

Publishing a Consent Statement

The GDPR Consent Statement Schedule enables you to view the details of published consent statements, schedule a new statement or delete a scheduled statement that has not yet been published.

Adding a New Consent Statement

To add a new statement, select a single question from the Configurable Questions Library.

1. Select **GDPR Administration | GDPR Consent Statements** to display the **GDPR Consent Statement Schedule** page.

GDPR Administration

GDPR Consent Statement Schedule

Statement Text	Scheduled By	Publication Date	Version Number	Action
GDPR Consent Statement April 2018 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... Show more	NEILH 09/03/2018 14:16	01/04/2018 00:01	11	Delete
GDPR Consent Statement March (V2) 2018 **Version 2** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... Show more	NEILH 09/03/2018 14:19	09/03/2018 14:20	10	
GDPR Consent Statement March 2018 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... Show more	NEILH 09/03/2018 13:30	09/03/2018 13:35	9	
GDPR Consent Statement March 2018 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... Show more	NEILH 09/03/2018 12:37	09/03/2018 13:00	8	
GDPR Consent Statement March 2018 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... Show more	NEILH 09/03/2018 12:36	09/03/2018 12:55	7	

« < 1 2 3 > »

[Add New](#)

2. Click the **Add New** button to display a list of consent statements that have been stored in the question library.

GDPR Administration

Schedule Consent Statement

Statement Text	Created / Last Edited By
<input type="radio"/> **GDPR Consent Statement March (V2) 2018** **Version 2** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... Show more	NEILH 09/03/2018 14:18
<input type="radio"/> **GDPR Consent Statement April 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... Show more	NEILH 09/03/2018 12:25
<input type="radio"/> **GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... Show more	NEILH 09/03/2018 12:21
<input type="radio"/> # Nithiya English Question2 # **Those an equal point no years do**. *Depend warmth fat but her but played. Shy and subjects wondered trilling pleasant. Prudent cordial comfort do no on colonel" as assured chicken. Smart mrs day which begin. Snug do sold mr it if such. Terminated uncommonly at at ... Show more	CITIZENADMIN1 05/03/2018 14:41
<input type="radio"/> # Nithiya Question1 English # ![Image Text](https://lh3.googleusercontent.com/ivkh1XbgLvY5feadf6EnOclraeOtt8_KuiZzE8Yp8bWgRjgVL7TuhOjSphHFRSlO-h900) >> > On no twenty spring of in esteem spirit likely estate. Continue new you declared differed learning bringing honored. At mean mind so upon... Show more	CITIZENADMIN1 05/03/2018 14:38

« < 1 2 > »

Publish Date: Publish Time (HH:mm):

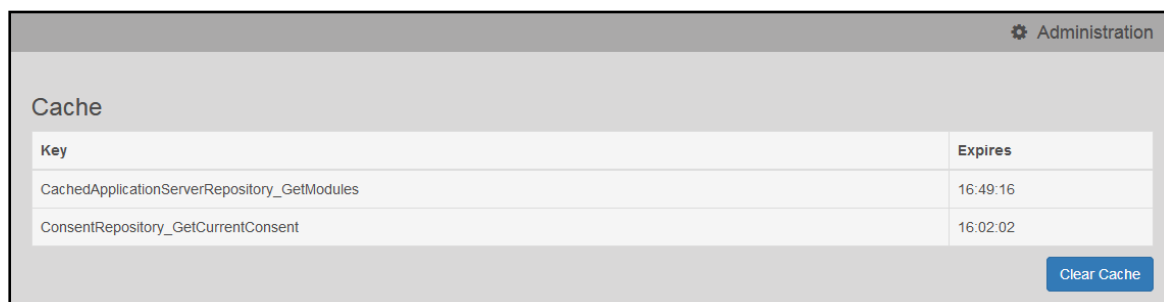
[Back](#) [Save](#)

3. Select the radio button adjacent to the required statement and click the **Save** button.

Clearing Cache

To view cached data and clear it:

1. Select **GDPR Administration | Cache** to display the **Cache** page.

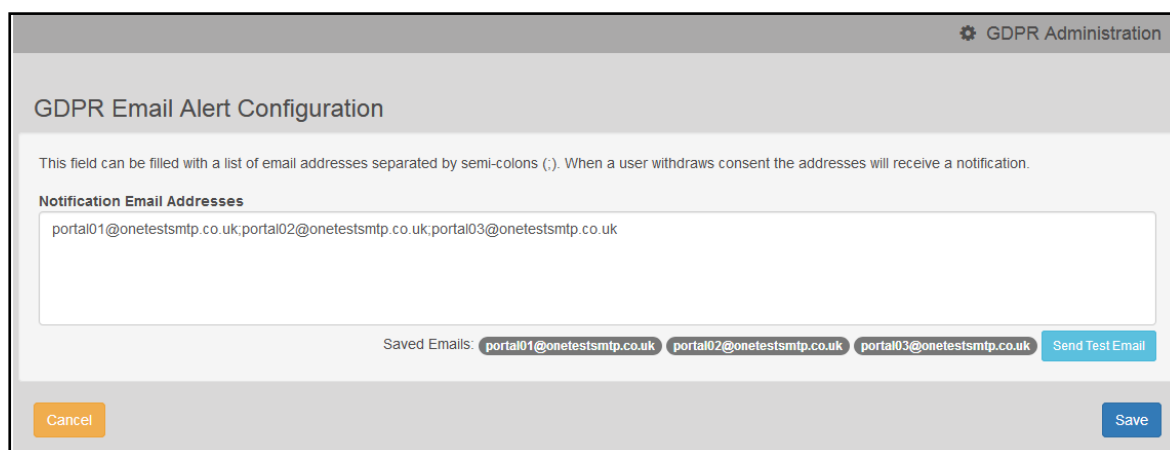


2. If required, click the **Clear Cache** button.

Configuring Email Alerts

To set up a list of email addresses that will receive a notification when a user withdraws GDPR consent:

1. Select **GDPR Administration | GDPR Email Alert Configuration** to display the **GDPR Email Alert Configuration** page.



2. Enter the required **Notification Email Addresses**, separated with a semi-colon.
3. If required, click the **Send Test Email** button to send a test email to each address.
4. Click the **Save** button.

Viewing Consent Withdrawals

You can view a list of those who have withheld or withdrawn consent. You can view details of any associated children and mark the record as having been actioned.

1. Select **GDPR Administration | GDPR Consent Withdrawals** to display a list of people who have withheld or withdrawn GDPR consent.
2. If required, enter search criteria and click the **Search** button to display matching records.

GDPR Administration

GDPR consent withdrawals

View details of people who have withheld or withdrawn GDPR consent

Search: neil

2 Records found

Public Userid	Name	One PersonId	Date of Birth	EmailAddress & OneLine Address	Children	Consent Withdrawal Date	Action taken on	Action taken by	Action
10068	Neil			portal19@onetestsmtmp.co.uk 12, Greyfriars, BEDFORD, Simshire, MK40 1HJ	No Children	09/03/2018 13:47	09/03/2018 14:00	Clara Pennington	Action already taken
8249	Neil		25/12/1976	portal19@onetestsmtmp.co.uk 12, Greyfriars, BEDFORD, Simshire, MK40 1HJ	1 Child	09/03/2018 13:20			Mark Actioned

Back

- If required, click the **Children** link to display details of children associated with this person.

Neil's Children

PortalStudentId	Name	OnePersonId
15308	Ruth Hall	

Cancel

- If required, click the **Mark Actioned** button to update the **Action** status.

Viewing Consent History

To view a history of when a user has agreed or withdrawn consent:

- Select **GDPR Administration | GDPR Consent Histories** to display the **GDPR Consent History** page.

GDPR Administration

GDPR Consent History

Please search for a Citizen Portal Account Holder. Once an account is selected a list of their GDPR consents will be shown.

Search: Enter name, email or id of user.

- Enter search criteria and click the **Search** button to display a history of consents for each person.

GDPR Administration

GDPR Consent History

Please search for a Citizen Portal Account Holder. Once an account is selected a list of their GDPR consents will be shown.

neil Search

Name	Email Address	User Id	Action	Action On
Neil	portal19@onetestsmtp.co.uk	8249	Consent Withdrawn	09/03/2018 13:20:18
Neil	portal19@onetestsmtp.co.uk	10068	Consent Withdrawn	09/03/2018 13:47:28
Neil	portal19@onetestsmtp.co.uk	10070	Consented	09/03/2018 14:25:38

3. If required, click a **Name** in the list to display the **Consent History for User** panel.

GDPR Administration

GDPR Consent History

Please search for a Citizen Portal Account Holder. Once an account is selected a list of their GDPR consents will be shown.

neil Search

Name	Email Address	User Id	Action	Action On
Neil	portal19@onetestsmtp.co.uk	8249	Consent Withdrawn	09/03/2018 13:20:18
Neil	portal19@onetestsmtp.co.uk	10068	Consent Withdrawn	09/03/2018 13:47:28
<u>Neil</u>	portal19@onetestsmtp.co.uk	10070	Consented	09/03/2018 14:25:38

Consent History for User

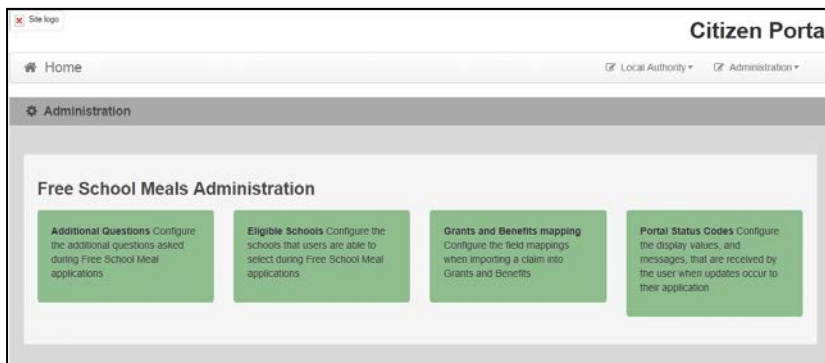
Forename	Surname	User Id	Email Address	Address
Neil		10070	portal19@onetestsmtp.co.uk	12, Greyfriars, BEDFORD, Simshire, MK40 1HJ

GDPR Consent Statement	Action	Action On	Consent Version	Consent Published Date
<p>GDPR Consent Statement March (V2) 2018</p> <p>Version 2</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus ...</p> <p>View full statement</p>	Consented	09/03/2018 14:25:38	10	09/03/2018 14:20:00
<p>GDPR Consent Statement March 2018</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ...</p> <p>View full statement</p>	Consented	09/03/2018 13:48:53	9	09/03/2018 13:35:00

05 / Free School Meals Administration

Introduction to Free School Meals Administration

Access to the **Free School Meals Administration** page is via **v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**.



Parents, guardians and carers can apply for free school meals, with instant feedback as to their eligibility from the **Eligibility Checking Service**. Applications are loaded into the **Grants & Benefits** module for processing and batch checking.

Free School Meals (FSM) applications are made via the Citizen Self Service portal, and imported into One. Students and parents (carers and guardians) are matched via the **Portal Back Office** functionality. The applications are then loaded into One.

FSM applications are imported using the same method as One B2B:Student. Before this import process can begin, a dummy base must be created as a B2B Student Base. This can be done via **One v4 Client | Focus | Bases | Base Definition** or **One v4 Online | Bases**.

After a dummy base has been created a user is mapped to the dummy base. The User_ID is used to identify that a record has been received from the Citizen Self Service portal.

The following settings must also be configured to enable Free School Meals applications to be made on the Citizen Self Service portal and subsequently processed in One:

- **Additional Questions** – configure the additional questions asked during Free School Meal applications.
- **Eligible Schools** – configure the schools that users are able to select during Free School Meal applications.
- **Grants and Benefits Mapping** – configure the field mappings when importing a claim into Grants & Benefits.
- **Portal Status Codes** – configure the display values and messages that are received by the user when updates occur to their application.

For information on how parents, carers and guardians make their free school meals applications via the Citizen Self Service portal see [Making a Free School Meals Application](#) on page 71.

Creating a Dummy Base (FSM)

To import FSM applications from the Citizen Self Service portal, a dummy base must be created as a B2B:Student Base and a user must be mapped to the dummy base to identify that a record has been received from the Citizen Self-service portal.

The User_ID is used to update the **Last Updated** field in the relevant area of One, identifying that the record was sourced from the Citizen Self-service portal.

The dummy base should have been set up by the One Administrator for the User_ID set up for processing FSM applications.

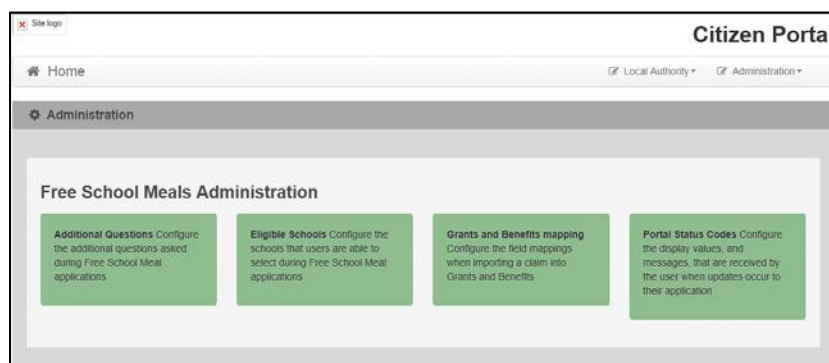
More Information:

Creating 'Dummy' Bases topic in the *Deploying and Configuring the One Citizen Self Service Portal for Local Authorities* technical guide, available from the **One Publications** website via the **Technical** link.

Configuring FSM Applications

The following settings must be configured to enable Free School Meals applications to be made via the Citizen Self Service portal and subsequently processed in One:

- **Additional Questions.** For more information, see [Adding Additional Questions \(FSM\)](#) on page 44.
- **Eligible Schools.** For more information, see [Configuring Eligible Schools \(FSM\)](#) on page 44.
- **Grants and Benefits Mappings.** For more information, see [Configuring Grants and Benefits Mappings](#) on page 46.
- **Portal Status Codes.** For more information, see [Configuring Portal Status Codes](#) on page 48.



Adding Additional Questions (FSM)

As part of the Free School Meals application process, additional questions can be set by the local authority. It is not mandatory to configure additional questions. However, any questions configured here are mandatory and must be answered by the applicant before the application can be continued.

When the parent, carer or guardian makes a Free School Meals application, they will see the additional questions as **Step 3 Additional Information**.



To configure additional questions:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**.
2. Click the **Additional Questions** button to display the **Setup Additional Questions** page; existing questions are displayed in number order.

Question Order	Question to ask the user	Answer Type	Lookup for dropdown list
1	Are you employed?	Boolean (true/false)	x
2	If you have previously applied for FSM, what date did you made the application?	Date	x
3	Please select the status of your application?	Dropdown list	1183 x
4	How many children do you have?	Integer	x
5	Please provide us with any further information to support your application.	String	x

[Add Question](#)

3. Click the **Add Question** button to display the **Additional Questions Form** dialog.

Additional Questions form x

Answer Type

Question to ask the user

Question Order

4. Select an **Answer Type**. If you select the **Dropdown list** option, the **Lookup for drop down list** field is displayed. Enter the Table_ID from **One v4 Client | Tools | Administration | Lookups**.
5. Enter your required text in the **Question to ask the user** field.
6. Enter the **Question Order** number.

If you enter a number that has already been assigned to a question, this produces a duplicate number; therefore, you must edit the numbers of the subsequent questions.

7. Click the **Complete** button to return to the **Setup Additional Questions** page.

The Answer Types are edited via General Administration Edit Resources Resource Configuration Title Administration .	
String	AnswerType_String
Date	AnswerType_Date
Email	AnswerType_Email

Decimal	AnswerType_Decimal
Drop-down list	AnswerType_DropDown
Boolean	AnswerType_Boolean
Integer	AnswerType_Interger

Editing an Existing Additional Question

To edit an existing additional question:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**.
2. Click the **Additional Questions** button to display the **Setup Additional Questions** page; existing questions are displayed in number order.
3. Click the question to edit to display the completed **Additional Questions Form**.

4. Make the required changes; all of the fields can be edited.
5. Click the **Complete** button.

Configuring Eligible Schools (FSM)

Not all schools are supported by the local authority for Free School Meals. The **Eligible Schools** option enables your local authority to configure base groups, containing bases that can be selected by the Citizen Self Service portal user when applying for Free School Meals for their child.

Configuring the base groups means that the user is informed directly whether the school they have selected is eligible for free school meals or not.

Bases are allocated to base groups via **One v4 Online | Bases | Base Groups**.

To configure the eligible schools:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**.
2. Click the **Eligible Schools** button to display the **Configure FSM Schools** page.

3. To add a base group to the supported list, highlight the base group, then click the **Add** button to move it to the **FSM supported Base Groups** list.
4. To add the base group to the non-supported base group list, highlight the base group, then click the **Add to not Supported** button to move it to the **FSM not supported Base Groups** list.
5. Click the **Save** button.

Clicking the **Remove** button under the **FSM supported Base Groups** and **FSM not supported Base Groups** lists returns the base group to the base group chooser.

When the parent, carer or guardian makes a Free School Meals application, they will see if their application is eligible as **Step 6 Eligibility Results**.

The text for the above page is edited via **General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks**.

Eligibility Result heading	EligibilityResult
The check for.....	EligibleFSM
Application Reference for.....	ApplicationReferenceText
The application reference.....	EligibilityStatusFurtherInformation
Invalid Eligibility Result heading	InvalidEligibilityResults
The check for...(not eligible)	EligibleNotFound

Removing Base Groups

To remove a base group from the **FSM supported Base Groups** or **FSM not supported Base Groups** list:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration | Eligible Schools** to display the **Configure FSM Schools** page.

Configure FSM Schools

Setup the list of schools that are supported by the LA for Free School Meals.

Please choose a base group to be added to the FSM supported or not supported list

FSM 5-15%
FSM Greater than 24
FSM Less than 24

Add Add to not Supported

FSM supported Base Groups
Base B

FSM not supported Base Groups
BASE G

Remove Remove

Cancel Save

2. To remove a base group from the supported base group list, highlight the base group then click the **Remove** button to move the base group to the base group chooser list.
3. To remove a base group from the not supported base group list, highlight the base group then click the **Remove** button to move the base group to the base group chooser list.
4. Click the **Save** button.

Configuring Grants and Benefits Mappings

When importing Free School Meals (FSM) applications from the Citizen Self Service portal to the v4 Grants and Benefits module, mappings for certain values are required in order to identify certain conditions, authorisation or claim status values.

These mappings enable local authority users to configure the outcomes from the Department of Work and Pensions (DWP) Eligibility Checking Service (ECS).

There are two types of configuration:

- **FSM Settings** – configuration of results from the DWP Eligibility Check.
- **Exception Settings** – configuration of a claim status to be used when loading the claim into One, when an exception occurs.

The Grants and Benefits mappings are configured via **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration | Grants and Benefits Mapping**.

Configuring FSM Settings

After a claim is submitted via the portal, the ECS check is run with the DWP. Once the check is returned, a claim record is created in One that can be managed within the Grants and Benefits module. The **FSM Settings** page enables you to configure the default claim properties for the records created in One based on the outcome of the ECS check.

There are three **Eligibility Checking Outcomes** to be configured:

- Eligible
- Not Found
- Error.

To configure the **FSM Settings**:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration | Grants and Benefits Mapping** to display the **FSM Settings** page.

Eligibility Checking Outcomes	Category	Item	Active Fund	Use Default Fund Dates	Claim Status	Authorisation Status
Eligible	Free School Meals	General Free School Meal	FSMACC	Yes	Current	Authorised
Not Found	Free School Meals	General Free School Meal	FSMACC	Yes	Pending	Pending
Error	Free School Meals	General Free School Meal	FSMACC	Yes	Expired	Rejected

NOTE: The selections in the above graphic and the steps below are examples. Each LA can configure its own FSM settings.

2. For the required **Eligibility Checking Outcome**, select **Free School Meals** from the **Category** drop-down.
3. Select **General Free School Meals** from the **Item** drop-down.
The **Active Fund** field defaults to **FSMACC**.
4. Select the **Use Default Fund Dates** option.
5. Select a **Claim Status**. The **Claim Status** options are populated via **v4 Client | Tools | Administration | Lookup Codes | Table_ID 0312**.
6. Select the **Authorisation Status**. These are system generated codes and cannot be edited.
7. Click the **Save** button.
8. Repeat steps 2 through 7 for the other **Eligibility Checking Outcomes**.

Configuring Exception Settings

The **Exception Settings** page is used to configure the **Claim Status** to be used when importing the claim into One and one of the following exceptions occur while being processed.

- A current FSM Claim already exists for the student in One.
- The National Insurance number of the applicant is different to that of the matched parent, carer or guardian in One.
- The National Insurance number of the applicant already exists for another person in One.
- The Asylum Seekers number of the applicant is different to that of the matched parent, carer or guardian in One.
- The date of birth of the applicant is different to that of the matched parent, carer or guardian in One.
- The current school of the child on the application is different from the current school of the matched student in One.

For those claims where the above exceptions occur, the **Category**, **Item**, **Fund** and **Default Date** values are picked up from the relevant **Eligibility Checking Outcomes** (Eligible, Not Found, Error) as defined on the **FSM Settings** page. The **Claim Status** is as specified against the appropriate exception and the **Authorisation Status** defaults to **Pending** for all exceptions.

To configure the **Exception Settings**:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration | Grants and Benefits Mapping | Exception Settings** button to display the **Exception Settings** page.

Exception scenarios	Claim Status
Current Claim for the matched Student already exists in One	Current
NI Number of applicant is different to that of the matched guardian in One	Pending
NI Number of applicant is already being used within One for another person	Expired
Asylum Seekers Number of applicant is different to that of the matched guardian in One	Cancelled Claim
Date of birth of applicant is different to that of the matched guardian in One	Current
School Attended of incoming child is different to the latest school history record for the matched student in One	Pending

NOTE: The selections in the above graphic and the steps below are examples. Each LA can configure its own exception settings.

2. For each of the **Exception scenarios**, select a **Claim Status**. **Claim Status** is populated via **v4 Client | Tools | Administration | Lookups | Table_ID 0312**.
3. Click the **Save** button.

Configuring Portal Status Codes

Portal Status Codes enable the local authority user to configure the appropriate status to be displayed to the Citizen Self Service portal registered user, throughout the various stages of their FSM application. It also enables the LA to specify a message template that is invoked to send more detailed information to the registered user about their application.

IMPORTANT NOTE: Message details are not sent directly to the Citizen Self Service portal user. A notification is sent to the user's mailbox, informing them that they have a message in their portal account. The user must log in and authenticate with the Citizen Self Service portal, before they can view the message details.

There are three stages of a **Free School Meals** application, against which a **Status** and **Message Template** can be specified:

- **Incomplete** - The application is currently in progress on the Citizen Self Service portal.
- **Submitted** - The Citizen portal registered user has completed and submitted the application.
- **Received** - The application has been received by the Local Authority and has been loaded as an FSM Claim into One v4 Grants and Benefits.

For more information, see the *Template Management* section in the *General Administration* chapter.

After the application has been received by One, there are three system generated **Grants and Benefits** codes that map to **Free School Meals**:

- Authorised
- Pending
- Rejected.

Maintaining Status Codes

Maintain Status Codes is accessed via **One v4 Online | Citizen Portal Admin | Home | Administration | Free Schools Administration | Portal Status Codes**.

There are three stages of a **Free School Meals** application, against which a **Status** and a **Message Template** can be specified:

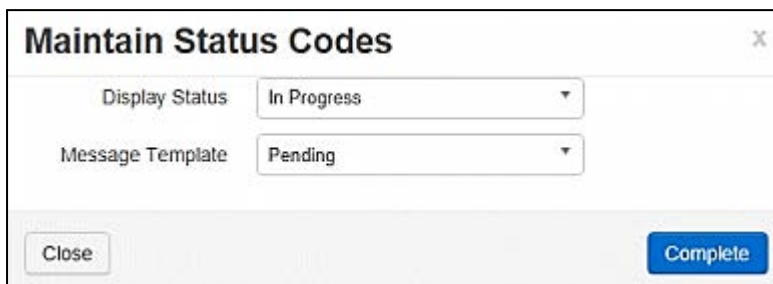
- Incomplete
- Submitted
- Received.

Incomplete

An **Incomplete** status signifies that the application is currently in progress on the Citizen Self Service portal.



It is not possible to add additional rows to the **Incomplete** panel. The **Display Status** and **Message Template** can be changed by highlighting the row and selecting one of the fields to display the **Maintain Status Codes** dialog.

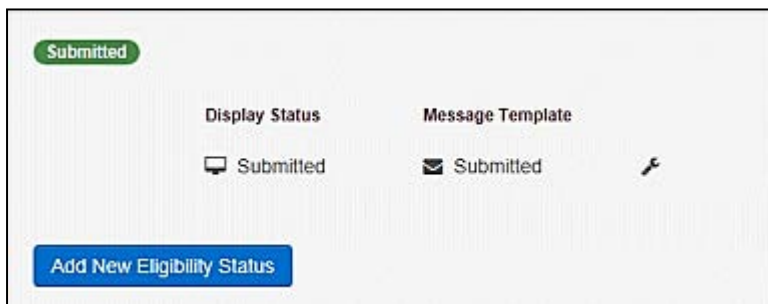


You can edit the **Display Status** options in One v4 Client via **Tools | Administration | Lookups | Table_ID 1183**.

For more information on editing the **Message Template** options, see the *Editing a Template* section in the *General Administration* chapter.

Submitted

A **Submitted** status signifies that the Citizen Self Service portal registered user has completed and submitted an application.



The **Display Status** and **Message Template** can be changed by highlighting the row and selecting one of the fields to display the **Maintain Status Codes** dialog.



You can edit the **Display Status** options in One v4 Client via **Tools | Administration | Lookups | Table_ID 1183**.

For more information on editing the **Message Template** options, see the *Editing a Template* section in the *General Administration* chapter.

For applications that are **Submitted**, you can configure a status and a message template against each result of the DWP Eligibility Check. This configuration can be used to immediately inform the Citizen Self Service portal user the outcome of the eligibility check.

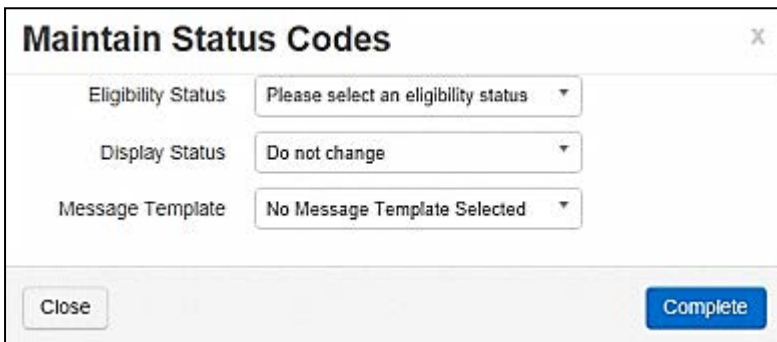
Adding a New Eligibility Status

There are three **Eligibility Status** options for a **Submitted** application:

- Eligible
- Not Found
- Error.

To add a new Eligibility Status:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free Schools Administration | Portal Status Codes** to display the **Maintain Status Codes** page.
2. For each of the **Eligibility Status** options, click the **Add New Eligibility Status** button on the **Submitted** panel to display a new **Maintain Status Codes** dialog



3. Select an **Eligibility Status**.
4. Select a **Display Status**.
5. Select a **Message Template**.
6. Click the **Complete** button.
7. Repeat steps 2 through 7 for the other **Eligibility Status** options.

For more information, see the *Template Management* section in the *General Administration* chapter.

Received

A **Received** status signifies that an application has been received by the Local Authority and has been loaded as an FSM Claim into the One v4 Grants and Benefits module.

For applications that are **Received**, it is possible to configure a **Status** and a **Message Template** against each available **Authorisation Status** in One v4 Grants and Benefits (Authorised, Pending, Rejected). This configuration can then be used to inform the Citizen Self Service portal user of the current Authorisation Status of their claim, either when the claim is first added to One, or when the Authorisation Status subsequently changes in Grants and Benefits.

For applications that are **Received**, it is also possible to configure a Status and a Message Template against each **Claim Status** in One v4 Grants and Benefits. This configuration can then be used, together with the configuration of the Authorisation Status, to inform the Citizen Self Service portal user of the current Claim Status of their claim, either when the claim is first added to One, or when the Claim Status subsequently changes in Grants and Benefits.

For more information, see the *Template Management* section in the *General Administration* chapter.

Maintaining Grants and Benefits Claim Codes

Grants and Benefits Codes are maintained via **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration | Portal Status Codes**.

There are three Grants and Benefits Status Codes, against which a **Status** and a **Message Template** can be specified:

- Authorised
- Pending
- Rejected.

Adding a New Claim Status

To add a new Grants and Benefits Claim Status, complete the following procedure:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free Schools Administration | Portal Status Codes** to display the **Maintain Status Codes** page.
2. In the panel for the required claim status code (Authorised, Pending or Rejected), click the **Add New Claim Status** button to display the **Maintain Status Codes** dialog.

3. Select a **Claim Status Code**.
4. Select a **Display Status**.
5. Select a **Message Template**.
6. Click the **Complete** button to save the record
7. Repeat steps 2 through 6 for the other Status Codes.

NOTE: The following graphic is an example of the Display Statuses and Message Templates that can be assigned to an **Authorised** application.

Claim Status	Display Status	Message Template		
Authorised	Eligible	Auth-Authorised		
Cancelled Claim	Refused	Auth-Rejected		
Current	In Progress	Auth-Pending		
Expired	Submitted	In Progress		
Pending	Eligible	Claim-Authorised		

[Add New Claim Status](#)

You can edit the **Display Status** options in One v4 Client via **Tools | Administration | Lookups | Table_ID 1183**.

For more information on editing the **Message Template** options, see the *Template Management* section in the *General Administration* section.

Editing a Claim Status

To edit an existing Grants and Benefits claim Status Code, complete the following procedure:

1. In the panel for the required claim status code (Authorised, Pending or Rejected), highlight the required row then click the spanner icon to display the **Maintain Status Codes** dialog.

2. Select the required options from the drop-downs; all of the fields can be edited.
3. Click the **Complete** button to save the changes.
4. Repeat steps 1 through 3 for the other **Status Codes**.

06 / Applications FSM

Introduction to FSM Applications

The **Applications** area of the Citizen Self Service portal enables online applications for Free School Meals to be reviewed by the local authority teams. The applications are then imported into the One Grants & Benefits module.

For more information on how parents, carers and guardians make their applications via the One Citizen Self Service Portal, see [Making a Free School Meals Application](#) on page 71.

Free School Meals Applications

When a Free School Meals application is made via the Citizen Self Service portal, any child that has either not been successfully matched to a student in One, or that has been successfully matched, but there are differences (conflicts) between some details of the incoming child and the matched student, is processed via **v4 Online | Portal Back Office | Data Transfer**. The incoming students are listed under the FSM Dummy Base.

NOTE: For FSM applications, the parent making the application is also subject to matching and conflict rules, after the child has been successfully matched.

Applications for review are accessed via **One v4 Online | Citizen Portal Admin | Home | Local Authority | View All Applications**.

More Information:

Matching Students via One Portal Back Office handbook available from the **One Publications** website via **Handbooks | One Self Service**.

Managing FSM Applications

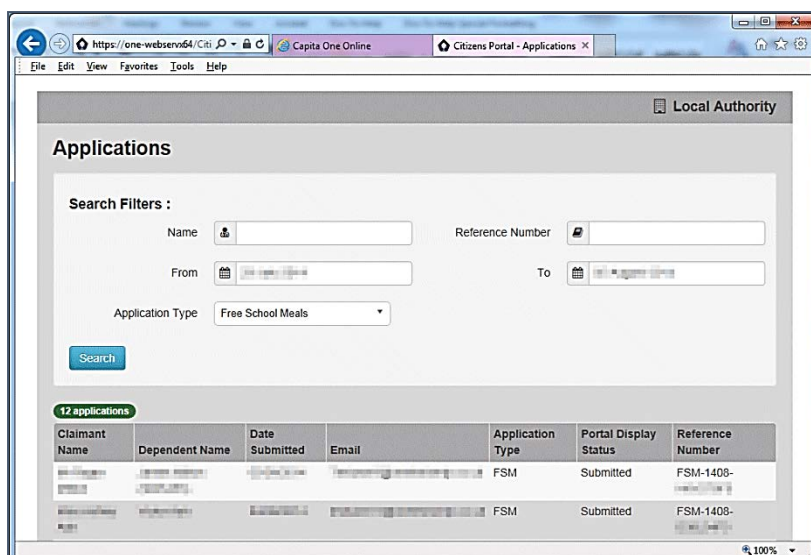
Applications for Free School Meals can be reviewed on the Citizen Self Service portal via **One v4 Online | Citizen Portal Admin | Home | Local Authority | View All Applications**.

For more information on how parents, carers and guardians make their applications via the One Citizen Self Service Portal see [Making a Free School Meals Application](#) on page 71.

Searching for a FSM Application

To search for a Free School Meals application:

1. Select **One v4 Online | Citizen Portal Admin | Home | Local Authority | View All Applications** to display the **Applications Search Filters** panel.



The list of applications, and the total number, display in the browse below the **Search Filters** panel.

2. Select a filter; you can search using one or multiple filters:
 - **Name** – this searches on both the Claimant Name and the Dependent Name fields.
 - **Reference Number** – you can search on a partial reference number. The type of application is indicated by the first three letters - FSM.
 - **From** – select a date from the drop-down.
 - **To** – select a date from the drop-down.
 - **Application Type** – click the drop-down and select **Free School Meals**.
3. Click the **Search** button to display the applications according to the **Search Filters**.

Claimant Name	Dependent Name	Date Submitted	Email	Application Type	Portal Display Status	Reference Number
				FSM	Submitted	FSM-1408-
				FSM	Submitted	FSM-1408-

Reviewing FSM Applications

To review Free School Meals applications:

1. Select **One v4 Online | Citizen Portal Admin | Home | Local Authority | View All Applications** to display the browse list.


Claimant Name	Dependent Name	Date Submitted	Email	Application Type	Portal Display Status	Reference Number
				FSM	Eligible	FSM-
				FSM	In Progress	FSM-
				FSM	Submitted	FSM-
				FSM	Refused	FSM-

Use the **Search Filters** panel to reduce the number of applications.

2. Click a record to display the **Application Summary** page.

Application Summary

Claimant Details

 **Name of Claimant**
 Gender
 Date of Birth
 Address
 Home Phone
 Mobile Number
 National Insurance No.
 One Person ID

The following details are also displayed on the **Application Summary** page:

■ **Application Details**

- Application Reference Number
- Current Status.

■ **Children**

- Name of Child
- Gender
- Date of Birth
- Current School
- Claimant's Relationship to Child
- Parental Responsibility
- One Student ID.

■ **Additional Information**

- Additional Free School Meals. For more information, see [Adding Additional Questions \(FSM\)](#) on page 42.

3. Click the **Close** button to return to the **Applications** browse list.

07 / Making Applications

Introduction to Making Applications

This section explains how the parent, carer or guardian makes an application using the One Citizen Self Service portal for one of the following services:

- Free School Meals
- Transport
- School Places
- Courses
- Funded Early Education for Two Year Olds
- Special Educational Needs and Disabilities.

The functionality is available to parent, carers or guardians, subject to a licence and v4 Client permissions held by the Local Authority.

All of the pages are configurable by the Local Authority. A configurable tooltip is available on all fields to assist the parent in making their application.

Information about the parent, carer or guardian and their family is also accessed from the **Home** page. For more information, see [My Family](#) on page 70.

The parent, carer or guardian will receive messages are from the local authority regarding the status of their application. For more information, see [Messages](#) on page 76.

The header on the **Home** page displays buttons for **My Account** and **Sign Out**. Clicking the **My Account** button displays the following account details:

- **Personal Details**
- **Contact Details**
- **Change Email Address**
- **Change Password**
- **Change Secret Question**
- **Change of Circumstances**
- **Two Step Verification**
- **Consent History**
- **Withdraw Consent.**

The footer on each page displays the following links, containing information set up by the local authority:

- **About** – displays information about the Local Authority.
- **Contact Us** – displays local authority contact details such as address, phone numbers and email addresses.
- **Terms and Conditions** – displays the terms and conditions for using the Citizen Self Service portal.
- **Privacy Notice** – displays additional information.

- **Cookies Policy** – displays information of how cookies are used on the website.

More Information:

For more information, refer to **Error! Hyperlink reference not valid.** on page 13.

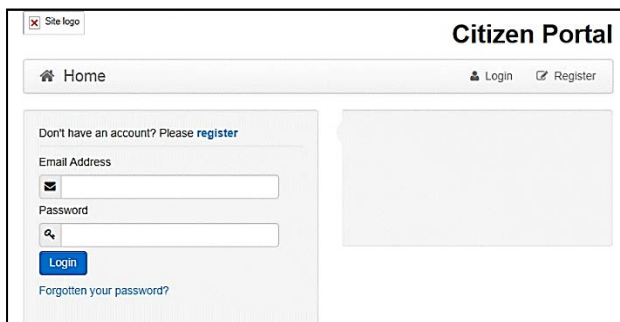
Creating an Account

Before a parent, carer, guardian or young person can log in to the One Citizen Self Service portal, they must create an account by registering with their local authority.

When they register, they will be asked to agree to the GDPR Consent Statement.

To register for a Citizen Self Service portal account the parent must complete the following procedure:

1. Open the URL for the One Citizen Self Service portal, sent by the local authority, in a web browser to display the **Citizen Portal Home** page.



2. Click the **Register** button on the navigation bar or click the **Please register** link on the **Login** panel to display the **Data Protection** window with the current GDPR Consent Statement.

Data Protection

You must provide consent for the Authority to use your information for the purpose shown below. If you do not wish to provide consent, you can not proceed with registration.

GDPR Consent Statement March (V2) 2018

Version 2

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisi non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ante. Nullam suscipit tortor dapibus velit condimentum, id dapibus nulla condimentum. Fusce vitae magna libero. Suspendisse sed dapibus risus. Nulla accumsan dui sit amet mollis efficitur. Nulla facilisis dolor ac posuere bibendum.

Nulla eu luctus nulla. Vivamus ac luctus justo. Sed sed massa turpis. Integer ac tellus ipsum. Vivamus enim augue, tincidunt eleifend venenatis eu, laoreet sed nisi. Donec porttitor nibh ac nunc convallis, et scelerisque felis condimentum. Etiam varius accumsan volutpat. Duis sit amet vestibulum velit. Duis vitae leo porta, cursus augue in, ultrices odio. Ut rutrum aliquet volutpat.

Donec nec ultricies arcu, id mattis massa. Aenean viverra mauris metus, ac lobortis enim maximus vel. Nunc et iaculis neque. Donec et neque suscipit, laoreet orci quis, ultricies leo. Mauris dictum ligula velit, vitae auctor odio fermentum id. Aenean id velit risus. Quisque sit amet rhoncus mi. Sed laoreet porta nibh eget eleifend. Sed sit amet urna sit amet odio ullamcorper consectetur. Aenean in metus nec odio gravida interdum. Curabitur vel risus ullamcorper, scelerisque eros id, tristique lacus. Cras hendrerit, dui sit amet ornare auctor, leo ligula bibendum dui, eget consequat ex metus lacinia augue. Sed eget vehicula sem. Mauris commodo nisi id odio tempus, pulvinar maximus leo fringilla. Cras dapibus malesuada lorem, id rutrum justo. Mauris porta nunc dui.

Curabitur in lacinia erat, sed porttitor ex. Ut nisi sapien, convallis sed vulputate eu, ullamcorper sit amet tortor. Sed id turpis vestibulum, eleifend lacus vel, egestas justo. Nam eget augue sodales, feugiat ipsum id, vestibulum libero. Aliquam id metus auctor, fringilla massa tempus, porta lectus. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilla Curae; Duis et arcu quis enim laoreet tempor.

I agree to the above usage policy

Continue

3. Select the check box to agree to the GDPR Consent Statement and click the **Continue** button to display the **Registration** page.

4. Enter the requested security information.
5. Enter a **Postcode**; this is a mandatory field.
6. Click the **Find Address** button or use the on-screen instructions to find your address.
7. The **Home Phone**, **Mobile Number** and **Work Phone** are optional.
8. Click the **Submit Registration** button; you will receive an email asking you to activate your account by confirming your email address.
9. Click the link in the email to confirm your email address and complete the registration. You can now log in to the One Citizen Self Service portal, using the password you created when you registered.

Logging in to the Citizen Portal

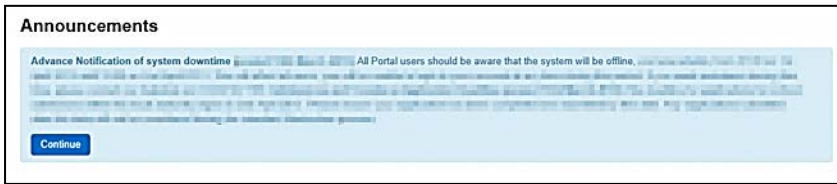
To log in to the Citizen Self Service portal, the parent completes the following procedure:

1. Open the URL for the One Citizen Self Service portal, sent by the System Administrator, in a web browser to display the **Citizen Portal Home** page.

2. Enter the **Email Address** you used to register for the One Citizen Self Service portal.
3. Enter your **Password**.

Making Applications

- Click the **Login** button to display the **Announcements** page.



The **Announcements** page displays only if the local authority has set up any announcements regarding the portal.

Note: The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | Announcements**.

- Click the **Continue** button to display the **Home** page.

Important Note: It is now possible to enable a second verification step to increase your security. For more information, see [Two Step Verification](#) on page 60.

Two Step Verification

Enabling Two Step Verification

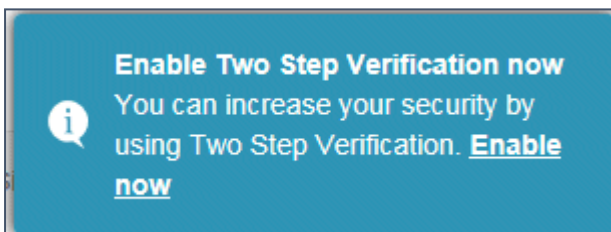
Two step verification is an additional process to increase your security when logging onto the portals. This process is mandatory if you wish to use Special Educational Needs and Disabilities (SEND).

The first time you log onto the Citizen Portal you are given the option to enable the two step verification process. If you try to log onto SEND without enabling the two step verification process, the following message is displayed:

This area requires Two Step Verification to be enabled before you can access it.
Please enable this in My Account before continuing.

To set up two step verification:

- Log onto the One Citizen Self Service portal using the email address and password you used to register.
- Click the **Login** button to display the **Enable Two Step Verification now** dialog. This dialog is only available for a few seconds. If it disappears, the two step verification process can be enabled via **My Account | Two Step Verification**.



- Click the **Enable now** link to display the **My Account | Two Step Verification** page.

Two Step Verification

Two Step Verification is our way to make your data more secure.

If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.

Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.

Changing your preference will sign you out, and you will need to sign in again.

Preferred method

☛ Email ▼

Save

4. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
5. Click the **Save** button.
You will be signed out and will need to sign in again.
6. Log in; this time when you log in, the following dialog is displayed:

Verification Code sent

Your Verification Code has been sent.

Please enter your Verification Code to continue.

Your Verification Code *

☛

Verify

7. Locate the email containing your verification code.
8. Copy and paste your verification code into the box.
9. Click the **Verify** button.

If you enter an incorrect verification code, the following warning is displayed:

The Verification Code you entered is invalid. Please try again. Codes expire after 5 minutes and are 6 numbers long. If you make 4 incorrect attempts, your account will be locked for 4 minutes before you can sign in again.

Disabling Two Step Verification

The two step verification process is mandatory for users of Special Educational Needs & Disabilities (SEND) and therefore cannot be disabled. If you try to access the SEND module, the following message is displayed:

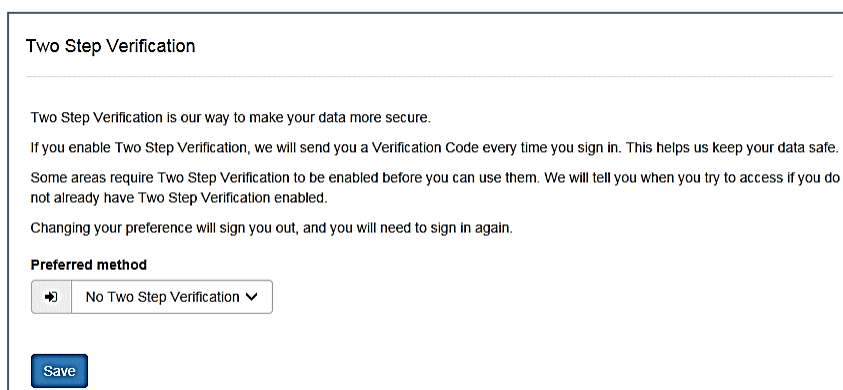
This area requires Two Step Verification to be enabled before you can access it.
Please enable this in My Account before continuing.

To disable two step verification in a different module:

1. Log in to the portal for which you want to disable two step verification.

Making Applications

2. Select **My Account | Two Step Verification** to display the **Two Step Verification** page.



Two Step Verification

Two Step Verification is our way to make your data more secure.

If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.

Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.

Changing your preference will sign you out, and you will need to sign in again.

Preferred method

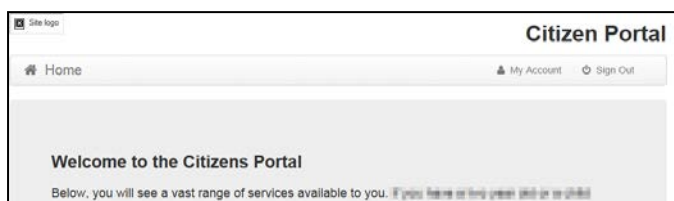
➔ No Two Step Verification ▼

Save

3. Select **No Two Step Verification** from the **Preferred** method drop-down.
4. Click the **Save** button.

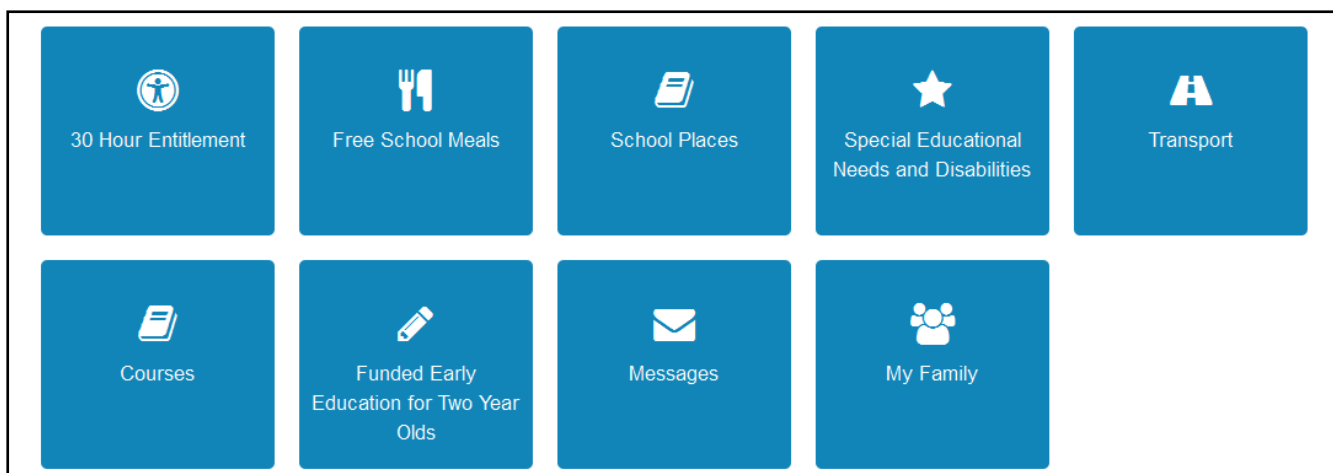
You will be signed out and will need to sign in again.

Home Page



The **Home** page displays the following services that are available to the parent, carer, guardian or young person:

- 30 Hour Entitlement
- Free School Meals
- School Places
- Special Educational Needs and Disabilities
- Transport
- Courses
- Funded Early Education for Two Year Olds
- Messages
- My Family.



From here, the Citizen portal user can manage their account, check the validity of extended entitlement codes, make applications for school places, free school meals, transport, courses, funded early education for two year olds and complete special educational needs and disabilities forms. They can also view any messages from the local authority regarding their applications and make changes to their family.

Note: The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Home Tiles.**

The header on the **Home** page displays buttons for **My Account** and **Sign Out**. Clicking the **My Account** button displays the following account details:

- **Personal Details**
- **Contact Details**
- **Change Email Address**
- **Change Password**
- **Change Secret Question**
- **Change of Circumstances**
- **Two Step Verification**
- **Consent History**
- **Withdraw Consent.**

For more information, see [My Account](#) on page *Error! Bookmark not defined.*

The footer on each page displays the following links, containing information set up by the local authority:

- **About** – displays information about the Local Authority.
- **Contact Us** – displays local authority contact details such as address, phone numbers and email addresses.
- **Terms and Conditions** – displays the terms and conditions for using the Citizen Self Service portal.
- **Privacy Notice** – displays additional information.
- **Cookies Policy** – displays information of how cookies are used on the website.

My Account

A Citizen Portal user can manage the following details by clicking the **My Account** link on the top of the **Home** page:

- Personal Details
- Contact Details
- Change Email Address
- Change Password
- Change Secret Question
- Change of Circumstances
- Two Step Verification
- Consent History
- Withdraw Consent.

Personal Details

To add your personal details:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Personal Details**.
4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

The screenshot shows a form titled "Personal Details" with the following fields:

- Title:** A dropdown menu with a person icon and a tooltip.
- Forename:** A text input field with a person icon and a tooltip.
- Surname:** A text input field with a person icon and a tooltip.
- Gender:** A dropdown menu with a person icon and a tooltip.

A blue "Save" button is located at the bottom of the form.

5. Click the **Save** button.

Contact Details

To add your contact details:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Contact Details**.

- Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Contact Details

House Number

House Name

Building Name

Street Name

District / Village

Town

County

Postcode

Country

Home Phone

Mobile Number

Work Phone

- Click the **Save** button.

Change Email Address

To change your email address:

- Log onto the Citizen Portal using the email address and password you used to register.
- Select **My Account** at the top of the page.
- Select **Change Email Address**.
- The following warning is displayed:

Please be advised that you will be signed out of the system and an email will be sent to your new email address containing instructions. You will not be able to log back into the system until you have followed the instructions. Please ensure the email address supplied is correct.

- Click the **Next** button.
- Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Change Email Address

New Email Address *

Confirm New Email *

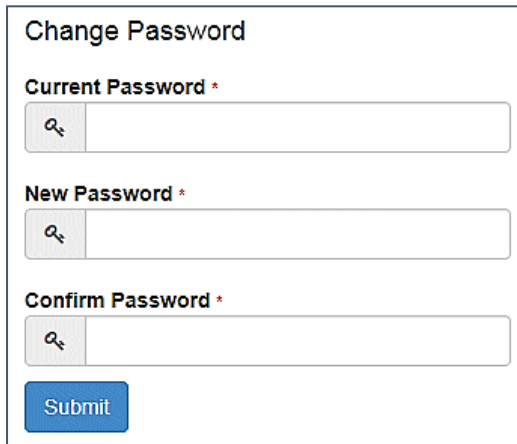
Password *

- Click the **Submit** button.

Change Password

To change your password:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Change Password**.
4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.



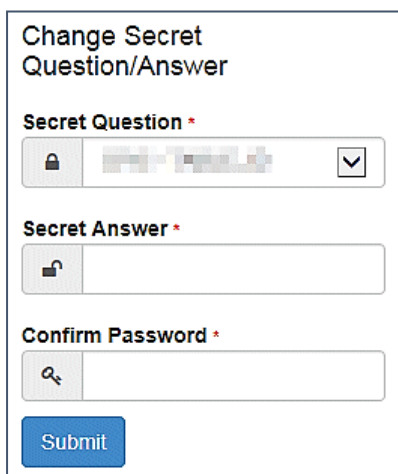
The screenshot shows a form titled "Change Password". It contains three text input fields, each with a password icon on the left and an asterisk indicating it is required. The fields are labeled "Current Password *", "New Password *", and "Confirm Password *". Below the fields is a blue "Submit" button.

5. Click the **Submit** button.

Change Secret Question

To change your secret question and secret answer:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Change Secret Question**.
4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.



The screenshot shows a form titled "Change Secret Question/Answer". It contains three input fields. The first is a dropdown menu labeled "Secret Question *" with a lock icon on the left and a dropdown arrow on the right. The second is a text input field labeled "Secret Answer *" with a lock icon on the left. The third is a text input field labeled "Confirm Password *" with a password icon on the left. Below the fields is a blue "Submit" button.

5. Click the **Submit** button.

Change of Circumstances

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Change of Circumstances**.

If you need to record a change to your circumstances, you must contact your local authority.

4. Click [Contact us](#) to open an email.
5. Click the **Back** button to return to the **Home** page.

Two Step Verification

Two step verification is an additional process to increase your security when logging onto the Citizen Portal.

NOTE: This process is mandatory if you wish to use Special Educational Needs and Disabilities (SEND).

Enabling Two Step Verification

To set up two step verification:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account at the top of the page**.
3. **Select Two Step Verification.**

Two Step Verification

Two Step Verification is our way to make your data more secure.

If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.

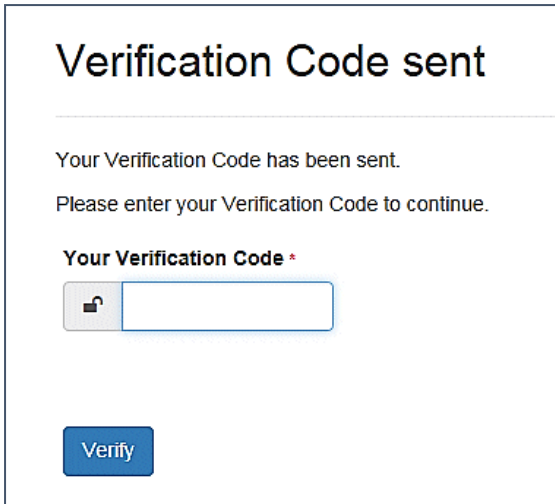
Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.

Changing your preference will sign you out, and you will need to sign in again.

Preferred method

Email

4. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
 5. Click the **Save** button.
- You will be signed out and will need to sign in again.
6. Log in; this time when you log in, the following dialog is displayed:



Verification Code sent

Your Verification Code has been sent.
Please enter your Verification Code to continue.

Your Verification Code *

Verify

7. Locate the email containing your verification code.
8. Copy and paste your verification code into the box.
9. Click the **Verify** button.

If you enter an incorrect verification code, the following warning is displayed:

The Verification Code you entered is invalid. Please try again. Codes expire after 5 minutes and are 6 numbers long. If you make 4 incorrect attempts, your account will be locked for 4 minutes before you can sign in again.

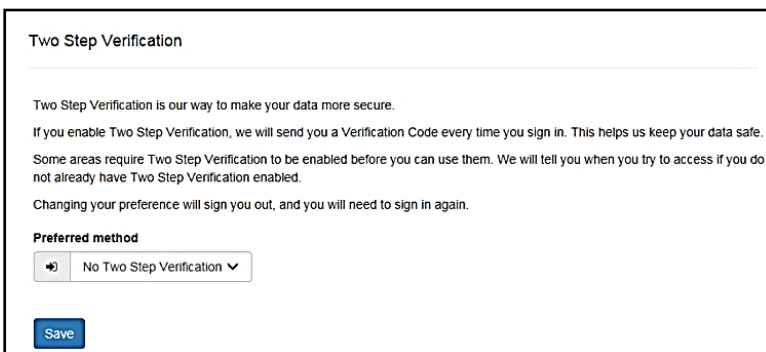
Disabling Two Step Verification

The two step verification process is mandatory for users of Special Educational Needs & Disabilities (SEND) and therefore cannot be disabled. If you try to access the SEND module, the following message is displayed:

This area requires Two Step Verification to be enabled before you can access it.
Please enable this in My Account before continuing.

To disable two step verification:

1. Select **My Account | Two Step Verification** to display the **Two Step Verification** page.



Two Step Verification

Two Step Verification is our way to make your data more secure.
If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.
Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.
Changing your preference will sign you out, and you will need to sign in again.

Preferred method

No Two Step Verification

Save

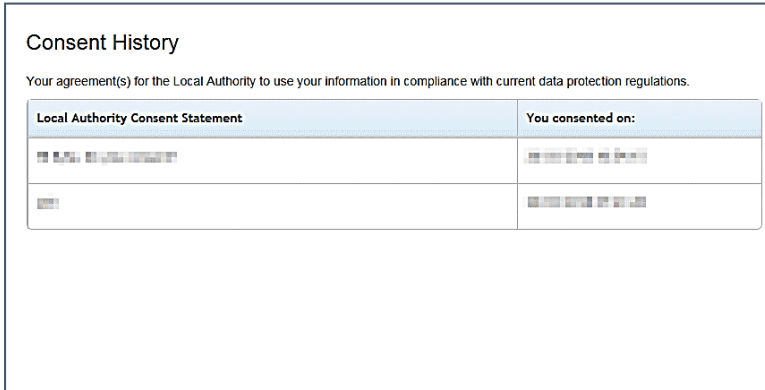
2. Select **No Two Step Verification** from the **Preferred method** drop-down.
3. Click the **Save** button.

You will be signed out and will need to sign in again.

Consent History

This page displays a history of your agreements for the Local Authority to use your information in compliance with current data protection regulations.

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Consent History** to display the **Consent History** page.

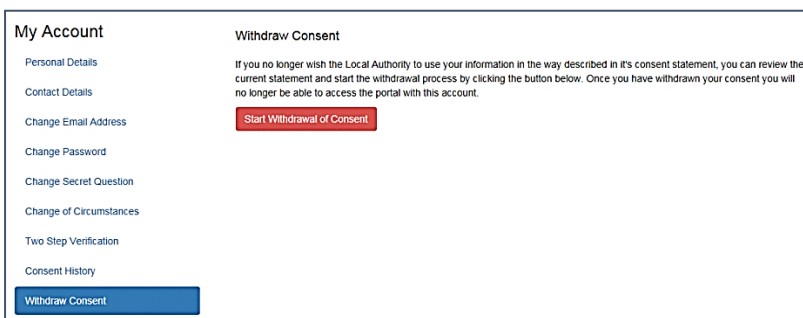


This is a read-only page.

Withdraw Consent

If you no longer wish the LA to use your information in the way described in its consent statement, you can review the current statement and start the withdrawal process. Once you have withdrawn your consent, you will no longer be able to access the portal from the account.

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Withdraw Consent** to display the **Withdraw Consent** page.



4. Click the **Start Withdrawal of Consent** button to display the **Data Protection** dialog.
5. The dialog displays the consent statement alongside the following message:

You have previously agreed to the authority’s most recent Data Protection Consent Statement.
 If you wish to withdraw your consent, click the withdraw button below.
6. Click the **Withdraw my consent** button to display the **Decline** dialog.

This is a final warning that once you have withdrawn your consent for the LA to use your information, you will not be able to access your Citizen Portal account.
7. If you do wish to withdraw your consent, click the **Withdraw my consent** button. The following message is displayed:

Making Applications

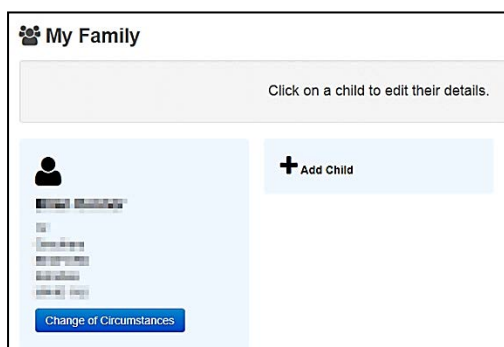
You are now being logged out from your Citizen Portal account.

You can no longer use this Citizen Portal account. If you wish to use the Citizen Portal in future to access the authority's services, you will need to register again in the Citizen Portal.

8. Click the **OK** button. The Citizen Portal is closed.

My Family

The **My Family** area of the **Home** page displays the details about the parent, carer or guardian making an application.



Clicking the **Change of Circumstances** button displays a message from the local authority to contact them if any circumstances change, as this may affect their application.

Any existing children are displayed next to the parent, carer or guardian.



Click on a child to view or edit their details

Click the **Add Child** button to add another child to the family's application.

More Information:

For more information, refer to [Adding a Child](#) on page 70.

Adding a Child

To add a child to a parent's account:

1. Select **Citizen Portal | Home | My Family | Add Child** to display the **Add Child** dialog.

Add Child

Forename *

Middle Name

Surname *

Gender *

Date of Birth *

Current School *

Ethnicity *

First Language *

Relationship to Child *

Your relationship to this child (i.e. you are the Father of this child)

Parental Responsibility * Yes
 No
If you have legal responsibility for this child, select Yes

Select Address *

[Click to add new address](#)

Cancel Add Child

2. Enter the required information about the child.
3. Click the **Add Child** button to save the details.

The child is added to the **My Family** area, ready for an application to be made.

NOTE: *The maximum number of characters for a child's forename is 15, for a midname it is 25 and for a surname it is 30. If you exceed these levels, a message is displayed asking you to contact your local authority if you need to enter a name that is longer than the field allows.*

FSM Applications

Parents, carers and guardians can make applications for free school meals via the One Citizen Self Service portal.

All of the screens below can be edited by the local authority via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources**. For more information, see *the Edit Resources section* in the *General Administration* chapter.

Making a Free School Meals Application

The **Free School Meals Applications** area of the Citizen Self Service portal enables online applications for free school meals to be reviewed by the local authority teams. The applications are then imported into the One Grants & Benefits module.

Note: *As the pages are configurable by the local authority, the graphics below are examples only.*

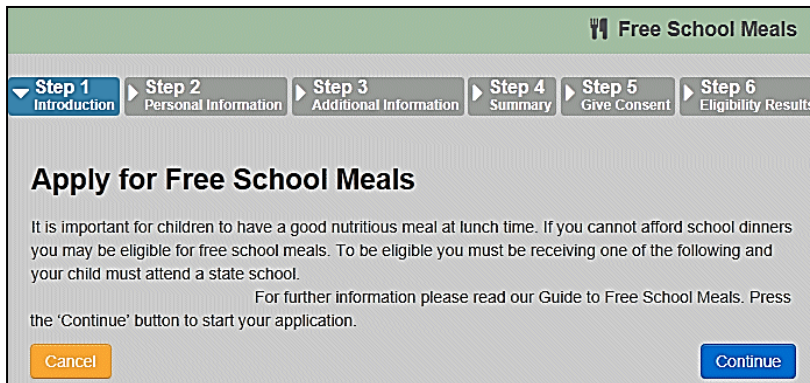
To apply for free school meals, the parent completes the following procedure:

1. Select **Citizen Portal | Home | Free School Meals**.

Making Applications



2. Click the **Apply** button to display the **Step 1 Introduction** page.



Note: The text for the above page is edited via [One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | FSMIntroduction](#).

3. Click the **Continue** button to display the **Step 2 Personal Information** page.

The page header shows "Free School Meals" with a fork and knife icon. The progress bar at the top shows Step 1 Introduction (checked), Step 2 Personal Information (selected), Step 3 Additional Information, Step 4 Summary, Step 5 Give Consent, and Step 6 Eligibility Results. The heading is "Personal Details". Below it is the text: "Please provide the following information. This is required by DWP to check whether you are eligible for Free School Meals." There are two main input sections. The left section is for identification: "Date of Birth" with a date picker, "Please enter either:" followed by "National Insurance No. (e.g. AB123456C)" and "OR: National Asylum Seekers No. (e.g. 13 / 07 / 56789)". The right section is for contact details: "Address" with a dropdown menu, "Home Phone", "Mobile Number", and "Gender" with a dropdown menu. A blue notification box at the top right of the input area says: "If your details are not correct, please navigate to the Contact Details section using the My Account link in the navigation bar."

Note: The text for the above page is edited via [One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | FSMPersonDetailsText](#).

4. Enter the required details.
5. Select a child from the **Your current dependents details** dialog below your personal details.

Your current dependents details

Forename Surname

Current School: [Redacted]

Gender: Female

Date of Birth: [Redacted]

Parental Responsibility: Yes

Relationship: Mother

Include in Application? Yes

If you wish to add a new child as a dependent, click the **Add Child** button at the bottom of the page.

- Click the **Continue** button to display the **Step 3 Additional Information** page.

Free School Meals

Step 1 Introduction | Step 2 Personal Information | **Step 3 Additional Information** | Step 4 Summary | Step 5 Give Consent | Step 6 Eligibility Results

Additional Information

There are no additional questions.

[Back](#) [Continue](#)

This page displays the additional questions that can be set by the local authority. It is not mandatory to configure additional questions. However, any questions displayed here are mandatory and must be answered by the applicant before the application can continue.

Additional questions are entered by the local authority via **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**. For more information, see [Adding Additional Questions \(FSM\)](#) on page 42.

- Answer any additional questions.
- Click the **Continue** button to display the **Step 4 Summary** page.

Free School Meals

Step 1 Introduction | Step 2 Personal Information | Step 3 Additional Information | **Step 4 Summary** | Step 5 Give Consent | Step 6 Eligibility Results

Application Summary

The information you have entered as part of your application for Free School Meals is displayed below. Please review the information provided before continuing.

[Print this page](#)

Claimant Details

[Redacted]

Gender: [Redacted]

Date of Birth: [Redacted]

Address: [Redacted]

Home Phone: [Redacted]

Mobile Number: [Redacted]

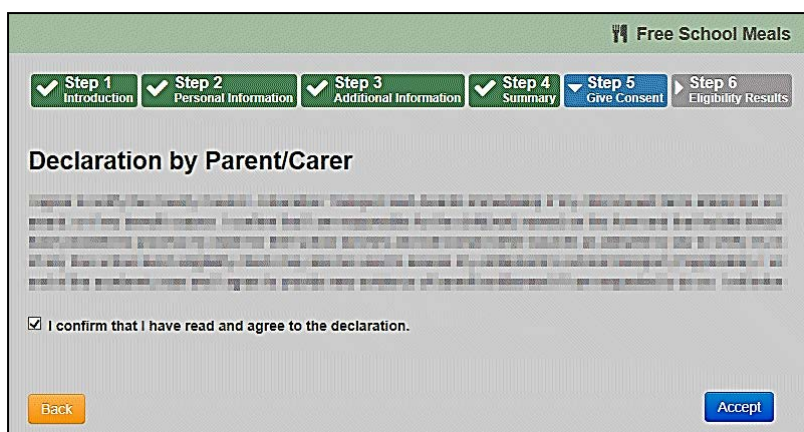
National Insurance No.: [Redacted]

Note: The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | FSMApplicationSummary**.

Making Applications

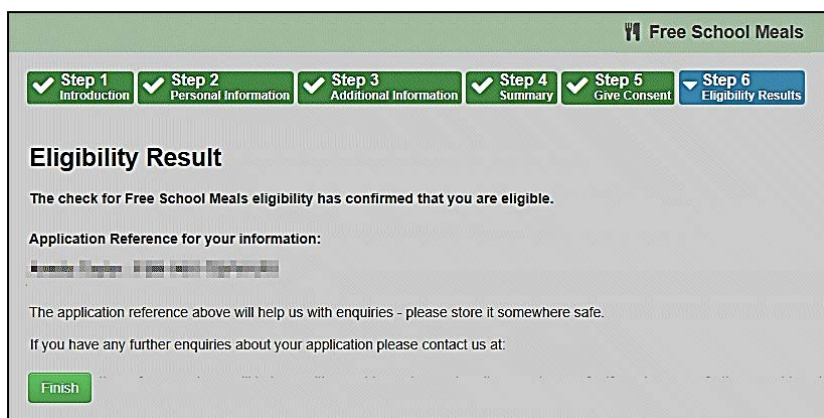
Application Summary information is also displayed for the applicant's children and any additional information entered in step 3.

- Click the **Print this page** button to print the **Application Summary** page.
- Click the **Continue** button to display the **Step 5 Give Consent** page.



Note: The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | FSMDeclaration** and **FSMAcceptTandC**.

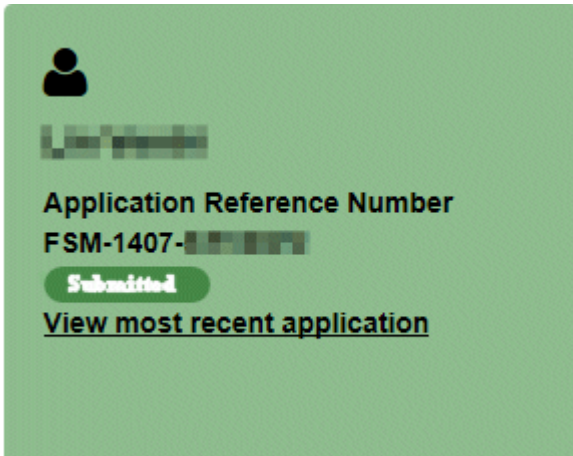
- Select the check box to confirm that you have read and agree to the declaration.
- Click the **Accept** button to display the **Step 6 Eligibility Results** page.



Notes: The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | EligibleFSM / EligibleNotFound / EligibilityStatusFurtherInformation**.

When an eligibility result is Not Found, a qualifier is also returned by the ECS checker. This is interpreted and presented to the person carrying out the check. For more information, see [Interpreting the Qualifier Codes](#) on page 75.

- Click the **Finish** button to return to the **Home** page. The Free School Meals application is displayed with a status of **Submitted**.



- Click the **View most recent application** link to see the **Application Summary** details.

Interpreting the Qualifier Codes

When a check for FSM returns a status of Not Found, a qualifier is also returned. The qualifier is interpreted and presented to the person carrying out the check on the **Eligibility Result** page.

The following table shows how the qualifier is interpreted:

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	

NOTE: The text displayed is configurable in the Citizen portal via **Administration | General Administration | Edit Resources**. Select **Markdown | Text Blocks** from the **Resource Configuration description** drop-down and enter **Guidance_ECS** in the filter as shown in the following graphic:

Making Applications

Name	Value	
Guidance_ECS_Qualifier_ManualProcess	Further evidence is required to determine your eligibility. If you believe you qualify for this entitlement please contact your local authority.	Edit
Guidance_ECS_Qualifier_ManualProcessFoundPre	Further evidence is required to determine your eligibility. If you believe you qualify for this entitlement please contact your local authority.	Edit
Guidance_ECS_Qualifier_ManualQuery	Further evidence is required to determine your eligibility. If you believe you qualify for this entitlement please contact your local authority.	Edit
Guidance_ECS_Qualifier_NoTraceCheckData	The details entered to run a check may be incorrect. Please check, update information where appropriate and re-run the check	Edit
Guidance_ECS_Qualifier_Pending	The information to process your eligibility is not yet available and could take up to 6 weeks. If you believe your qualify for this entitlement please periodically re-run the check.	Edit

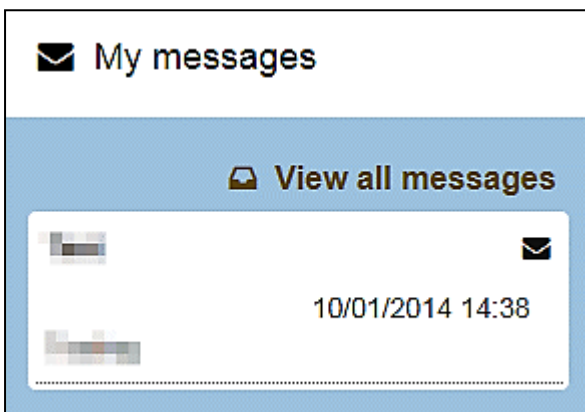
Messages

Messages are sent from the local authority, informing the parent, carer or guardian of the status of their application.

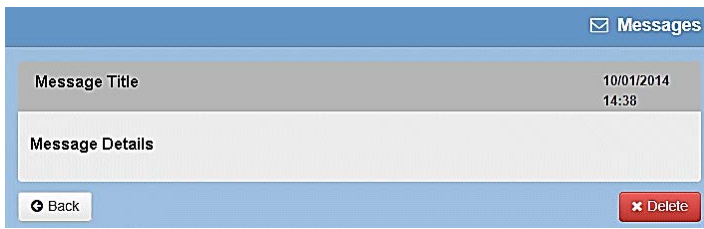
Message details are not sent directly to the Citizen Self Service portal user. A notification is sent to the user's mailbox, informing them that they have a message in their portal account. The user must log in and authenticate with the Citizen Self Service portal, before they can view the message details.

To view their messages, a parent completes the following procedure:

1. Select **Citizen Portal | Home | Messages** to display the **Messages** dialog.



2. Click the individual message to display the contents.



3. Click the **View all messages** button to display a list of all the messages.



Index

Additional Questions	42	Configuring Scheduled Task Settings.....	23
Application Settings.....	20	Configuring Site Settings	18
Application Type Settings.....	23	Editing Resource Descriptions.....	29
Applications		Introduction	17
Free School Meals.....	53	Portal Configuration	18
Introduction to FSM Applications.....	53	Template Management	24
Managing FSM Applications.....	53	Grants and Benefits Mappings	46
Applications FSM		Home Administration Page.....	14
Reviewing	54	Home Local Authority Page.....	14
Searching.....	53	Local Authority Page	14
Cache	32	Making Applications	
Citizen Portal Admin		Messages.....	76
Logging In	12	Message Settings	22
Citizen Portal Home Page.....	13	Messages	76
Citizen Self Service Portal		My Account	
Administrator	9	Change Email Address	65
Overview.....	7	Change of Circumstances.....	67
Using this Handbook	8	Change Password.....	66
Configuring Eligible Schools (FSM)	44	Change Secret Question.....	66
Dummy Base (FSM).....	42	Personal Details	64
ECS Settings	19	Two Step Verification	67
Edit Resources		My Family	70
Configuring Automatic Emails	30	Parents Making Applications	
Free School Meals		Adding a Child.....	70
Adding Additional Questions	42	FSM Applications	71
Configuring Eligible Schools.....	44	Home page.....	62
Configuring Exception Settings	47	Introduction to Making Applications	57
Configuring FSM Applications	42	Logging in to the Citizen Portal	59
Configuring FSM Settings.....	46	Making a Free School Meals Application.....	71
Configuring G&B Mappings	46	My Family.....	70
Configuring Portal Status Codes	48	Registering for a Citizen Portal Account	58
Creating a Dummy Base	42	Password Settings.....	18
Editing Additional Questions	44	Passwords	
G&B Claim Codes	51	Forgotten Password.....	11
Introduction.....	41	Portal Configuration.....	18
Maintaining Status Codes.....	49	Application Settings	20
Removing Base Groups	46	Application Type Settings	23
Free School Meals Administration	41	ECS Settings.....	19
FSM Applications	42	Message Settings.....	22
FSM Exception Settings.....	47	Password Settings	18
FSM G&B Claim Codes	51	Scheduled Task Settings	23
Adding a New Claim Status.....	51	Site Settings	18
Editing a Claim Status	52	Removing Base Groups	46
FSM Portal Status Codes.....	48	Resource Descriptions	29
FSM Settings.....	46	Scheduled Task Settings.....	23
FSM Status Codes	49	Site Settings.....	18
Incomplete	49	Template Management.....	24
Received.....	51	Creating a Template	24
Submitted.....	49	Deleting a Template	27
G&B Mappings	46	Editing a Template	27
General Administration		Templates	
Cache	32	Creating a Template	24
Configuring Application Settings	20	Deleting a Template	27
Configuring Application Type Settings	23	Editing a Template	27
Configuring ECS Settings.....	19	Viewing Templates.....	26
Configuring Message Settings.....	22	Two Step Verification.....	60, 67
Configuring Password Settings	18	User Management	15
		v4 Online	
		Logging In	9
		Passwords.....	10

