



# Transport Online

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(3.69.007)

Handbook

**CAPITA**

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## 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](mailto:onepublications@capita.co.uk)

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

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# 01 | Document Change Control

Date	Release	Description
August 2019	3.69.007	<p>Changes have been made to the <b>Find Address</b> functionality throughout the <b>One Citizen Portal</b> for this hotfix:</p> <ul style="list-style-type: none"> <li>■ When registering for a Citizen Portal account, a link is available to the <a href="#">Post Office Postcode Finder</a> website to help you with your address.</li> <li>■ A <u>full</u> postcode must be used to search for an address.</li> <li>■ Only addresses matching the <u>full</u> postcode are displayed in the search results.</li> <li>■ If the address you require is not on the LA's database, a <b>Not able to find your address?</b> button is available to add the new address details.</li> <li>■ You <u>must</u> use the <b>Search</b> button and <u>not</u> the <b>Enter</b> key to search for an address.</li> <li>■ There is no limit to the number of addresses that are displayed in the search results list.</li> </ul> <p>See <i>Creating an Account</i> on page 46</p> <p>See <i>My Account   Contact Details</i> on page 51</p> <p>See <i>My Family   Adding a Child</i> on page 57</p> <p>In the <b>Transport Portal</b>, applicants can only select their home address (that has been already recorded in the Citizen Self Service portal) or a pre-existing address from One. They cannot enter a free-form address.</p> <p>See <i>Making a Transport Application</i> on page 58.</p>
Summer 2019	3.69	<p>The <b>Secret Question</b> and <b>Answer</b> have been removed from the Registration, My Account and Forgotten Password processes to simplify the login process.</p> <p>A <b>Show</b> button now enables citizens to see their password as they type.</p> <p>Validation messages are displayed when the Title, Forename, Surname or Gender are changed on any of the <b>Personal Details</b> pages.</p> <p>The <b>Address Selection</b> process has been improved; users can now select an address from a known list instead of adding it manually.</p>

## Document Change Control

Date	Release	Description
		<p>A <b>partial postcode search</b> has been introduced to improve the <b>Find Address</b> process. An address can now be found using the Street name.</p>
		<p>If an address is changed, a validation message is displayed on any of the <b>Contact Details</b> pages.</p>
		<p>The 'white-space' has been trimmed on all form submissions, e.g "Ian" and "Ian ". This will prevent conflicts when matching data.</p>

# 02 | 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.



## Using this Handbook

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

- Local Authority
  - User Management.
- General Administration
  - Portal Configuration
  - Template Management
  - Edit Resources
  - Cache
- GDPR Administration.

The final chapter describes how the parent, carer or guardian makes an application using the One Citizen Portal..

# 03 | 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.

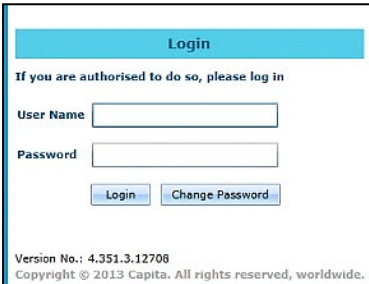
### More Information:

*Deploying and Configuring the One Citizen Self Service Portal for Local Authorities* technical guide, available from the [One Publications](#) website.

## Logging in to One v4 Online

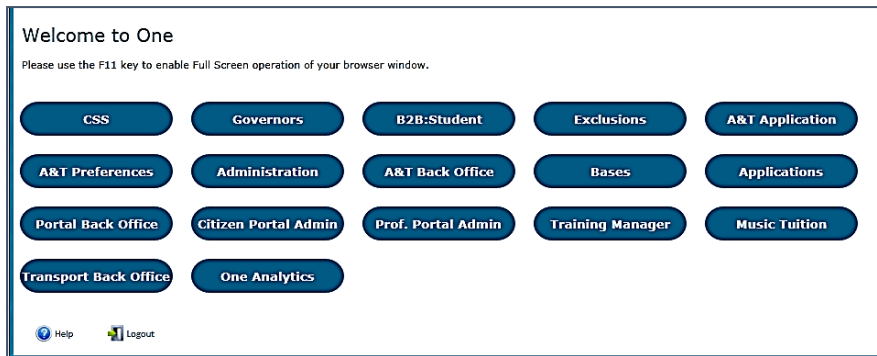
To log in to One v4 Online, you need to obtain a licence key for the required v4 Online module from Capita. You must also be set up as a user in One v4 Client.

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



7. Enter your **User Name**; this is the same as your v4 Client user name.
8. 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 6.
9. 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.

## 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:

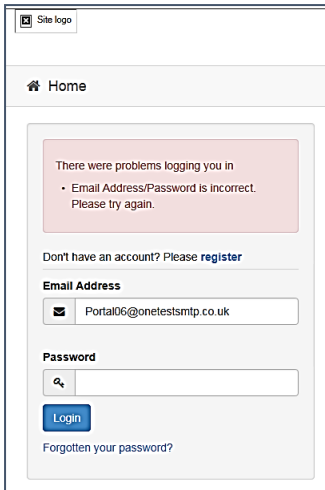
*RG\_Online\_Administration\_Login\_Logout* available from the [One Publications](#) website.

## Forgotten Password

If you have entered an incorrect email address or password, an error message is displayed.

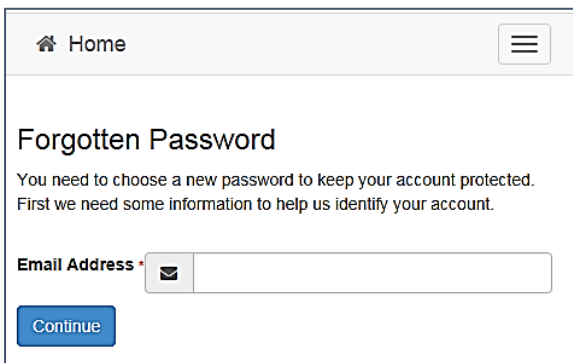
Check that you have entered the correct email address.

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



To reset a password:

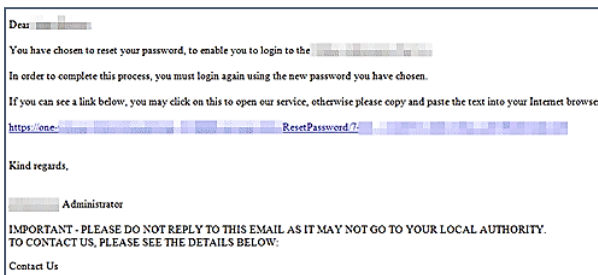
1. Click the **Forgotten your password?** link to display the **Forgotten Password** dialog.



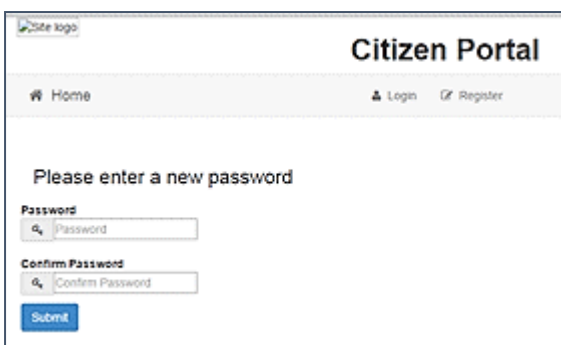
2. Enter your email address, then click the **Continue** button.

A message is displayed to confirm that a password change was requested.

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



3. Click the link in the email to access the Citizen Portal website.



4. Enter your new **Password**. Passwords are case sensitive.

## Managing Users

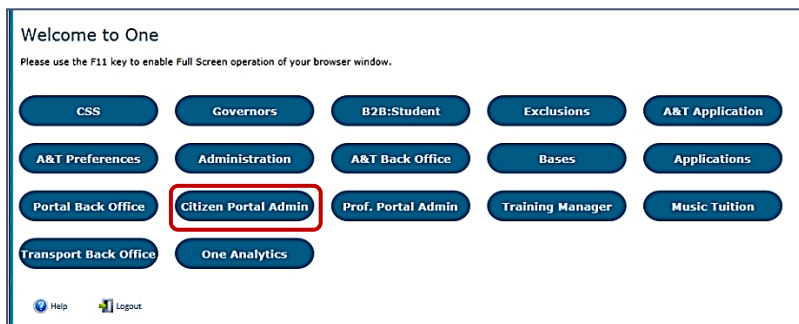
5. Enter your new password again in the **Confirm Password** field.
6. Click the **Submit** button. A message confirms that you have successfully changed your password.
7. Click the **Login** button to log in to the Citizen Portal with your new password.

## Logging in to Citizen Portal Admin

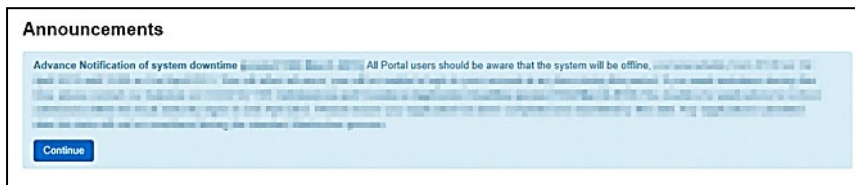
The **Citizen Portal Admin** functionality is available in One v4 Online. To use the Citizen Portal Admin you must have an email address, be set up as a user and belong to a user group in One v4. Your System Administrator will have set up the Citizen One Portal licence key and your permissions via **v4 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 5.



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



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

3. 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.

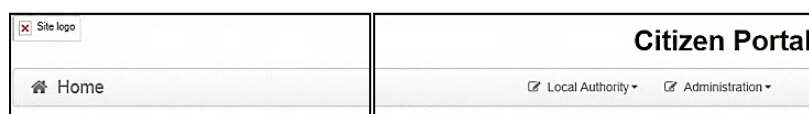
## The Citizen Portal Home Page

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

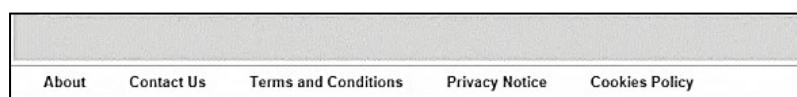
- **Administration** – for more information, see the [Home | Administration Page](#) section on page 9.
- **GDPR Administration** – for more information, see the *GDPR Administration* section on page 25.
- **Local Authority** – for more information, see the [Home | Local Authority Page](#) section on page 10.

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 **User Management** button displays the **User Management** page. For more information, see [User Management \(Local Authority\)](#) on page 10.

## 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'. At the top, there is a search bar with the placeholder text 'Enter part of First Name, Surname Or Email Address'. The search bar contains the text 'sh' and a 'Search' button. Below the search bar, it indicates '247 Records found' and provides pagination controls: '<< Previous 1 2 3 4 5 > 25 Next >>'. A table of user records is displayed below, with columns for 'Email Address', 'First Name', 'Surname', 'Confirmed', 'View Details', and 'Action'. The 'Action' column contains links for '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:

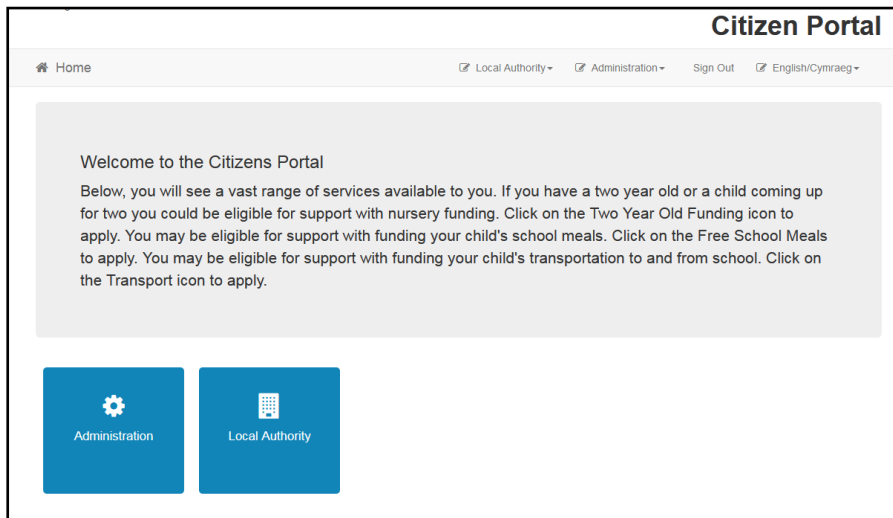
1. Select **v4 Online | Citizen Portal Admin | Home | Local Authority | User Management** to display the **User Management Search** dialog.
2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of users that have registered for the One Citizen Self 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.





# 04 | General Administration

## The Citizen Portal Home Page

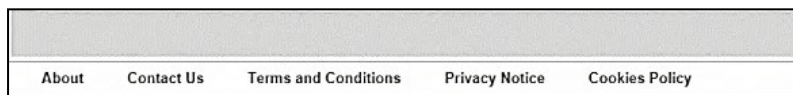


The **Citizen Portal Home** page enables you to access the following functionality:

- Administration.
- Local Authority.

These are accessed by clicking on the tile or selecting an option on the navigation bar.

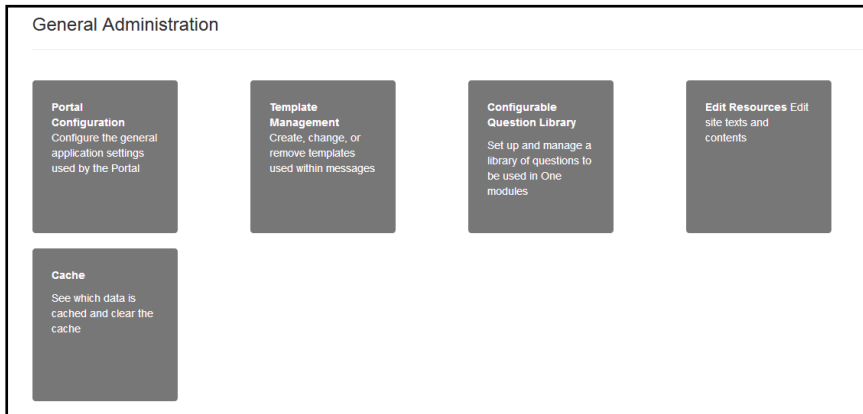
The footer displays the following links:



- **About Us** – displays information about the local authority. This text is formatted via **One v4 Online | 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 via **One v4 Online | 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 via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices\_TAndC**.
- **Privacy Notice** – displays additional information regarding privacy. This text is formatted via **One v4 Online | 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 via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices\_CookiesPolicy**.

## Administration page

The **General Administration** page is accessed via **Administration | General** or by clicking the **Administration** tile. It is also 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.
- **Template Management** – Create, change or remove templates.
- **Edit Resources** – Edit site texts and contents. This enables your LA to configure the Citizen Portal with your local references and advice. Most standard text displayed within the Citizen Portal can be edited to more accurately reflect your LA's business processes.
- **Configurable Question Library** – Setup and manage a library of questions.
- **Cache** – Clear cached data.

**Note:** In the **Template Management** tile, a new template **Thirty Hours Free Childcare - Citizen Expression of interest** is available for selection. This template enables an email notification to be sent out to a Provider whenever a parent chooses to share their entitlement details with them.

## 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.

### More Information:

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

## 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.

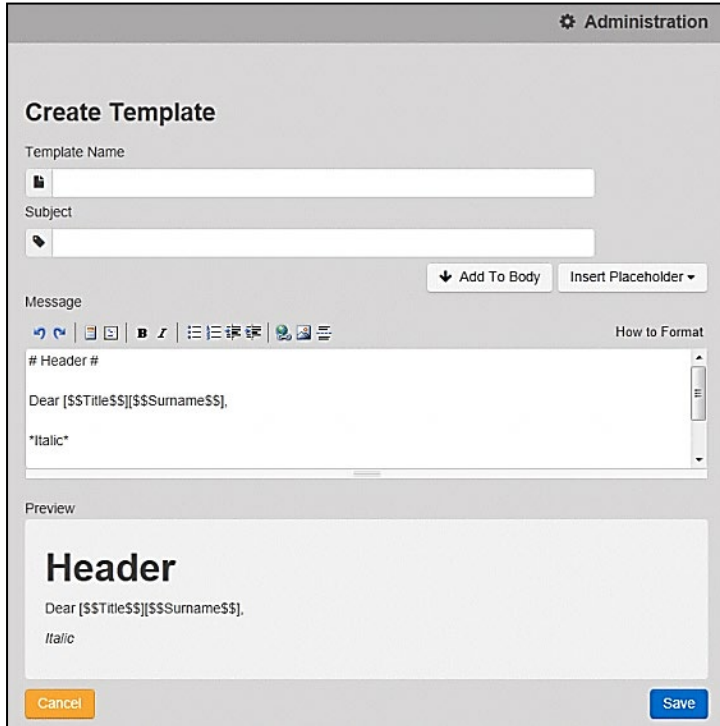
The screenshot shows the 'Create Template' form within the 'Administration' module. It features the following elements:

- Template Name:** A text input field with a small icon to its left.
- Subject:** A text input field with a small icon to its left.
- Message:** A rich text editor area with a toolbar containing icons for undo, redo, bold, italic, text color, background color, bulleted list, numbered list, link, unlink, and image. A 'How to Format' link is also present.
- Buttons:** 'Add To Subject' (with a left arrow) and 'Insert Placeholder' (with a dropdown arrow) are positioned above the message editor. 'Cancel' and 'Save' are at the bottom.
- Preview:** A section below the message editor for viewing the template's output.

## General Administration

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.



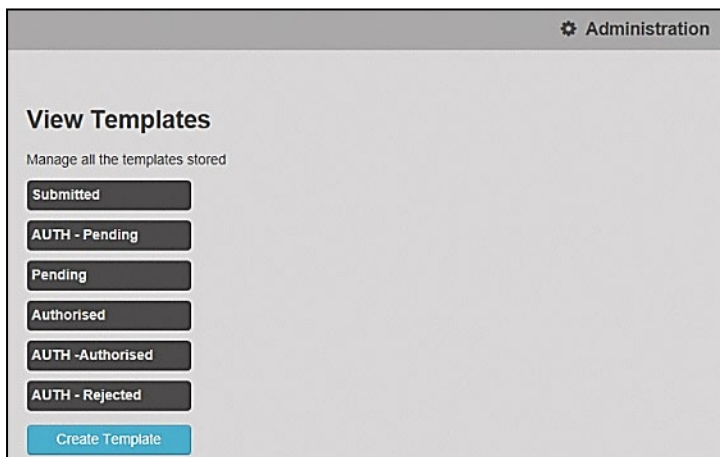
The screenshot shows the 'Create Template' interface. It has a header 'Administration' with a gear icon. The main title is 'Create Template'. There are three input fields: 'Template Name', 'Subject', and 'Message'. The 'Message' field has a toolbar with icons for undo, redo, bold, italic, link, unlink, list, and image. To the right of the message field is a 'How to Format' link. Below the message field is a 'Preview' section showing the rendered message. At the bottom are 'Cancel' and 'Save' buttons.

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

## Viewing Templates

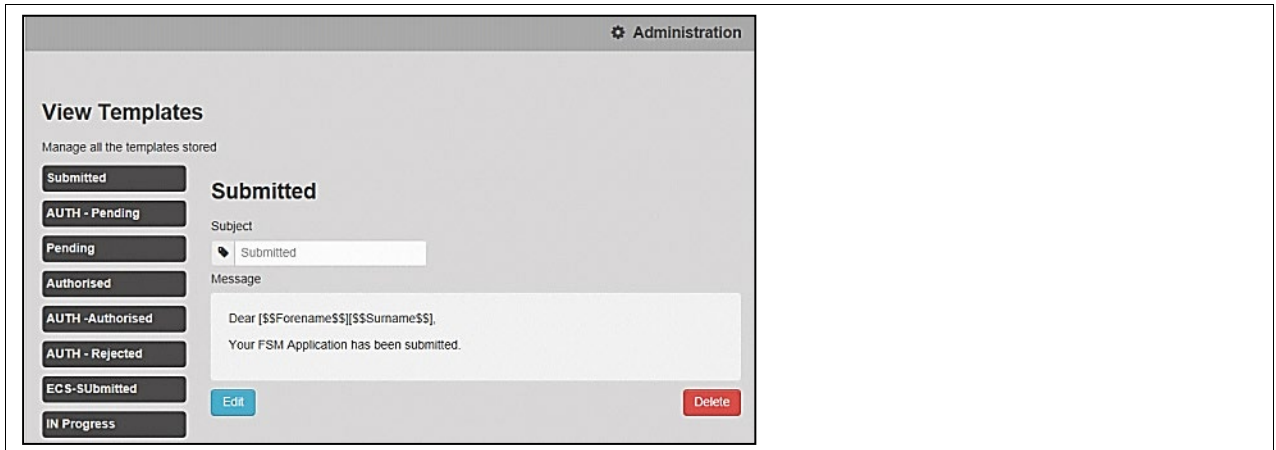
To view an existing template:

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



The screenshot shows the 'View Templates' interface. It has a header 'Administration' with a gear icon. The main title is 'View Templates'. Below the title is the text 'Manage all the templates stored'. There is a list of template statuses: Submitted, AUTH - Pending, Pending, Authorised, AUTH - Authorised, and AUTH - Rejected. At the bottom is a 'Create Template' button.

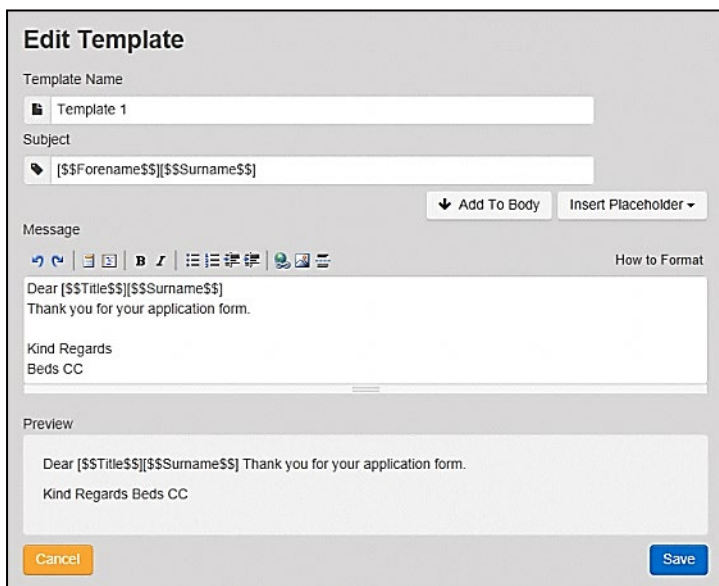
2. Click the template name to display the **Subject** and **Message** that are to be used in the message.



## 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.

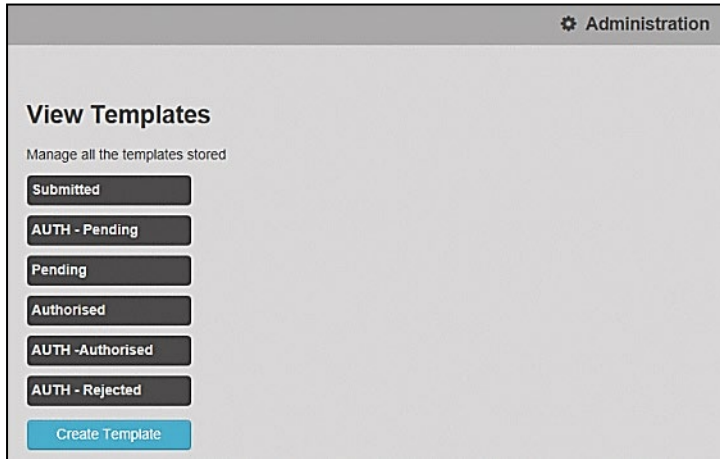


3. Edit the required fields; all of the fields on the **Edit Template** dialog can be edited.
4. Click the **Save** button.

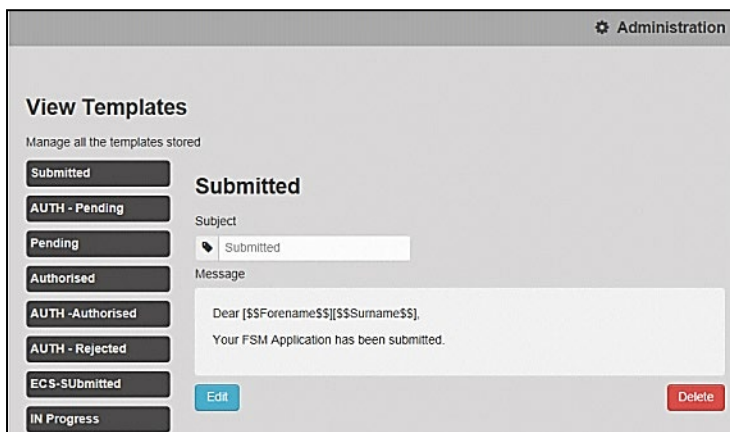
## Deleting a Template

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.



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

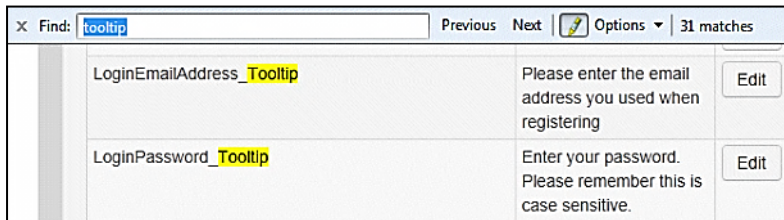
- Account
- Administration
- Admissions
- Citizen Thirty Hours Entitlement
- Consent Resources
- Free School Meals

- 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.



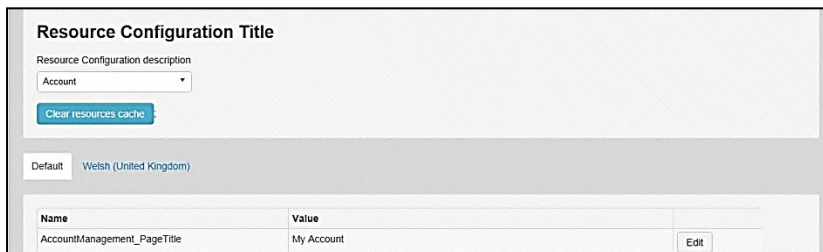
**NOTE:** You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.

## 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:

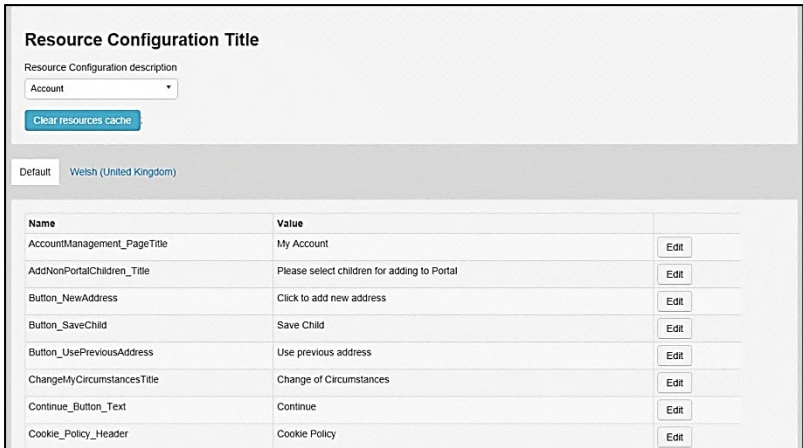
1. Select **Administration | General Administration | Edit Resources** to display the **Resource Configuration Title** page.



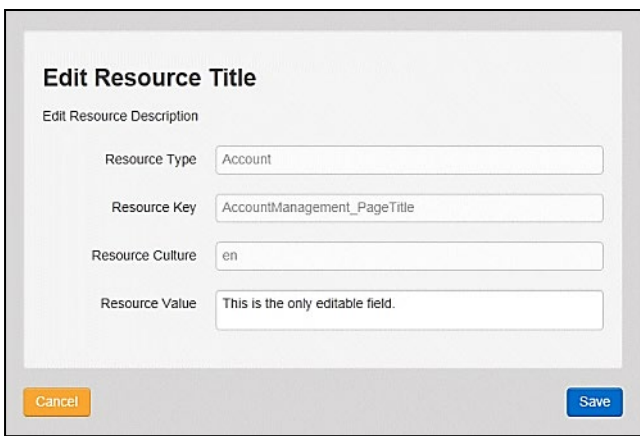
The default option is English (en). Click the **Welsh (United Kingdom)** button to display the Welsh (cy-GB) descriptions.

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





- 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)
- Enter your text in the **Resource Value** field.
  - Click the **Save** button to return to the **Resource Configuration Title** page to continue editing the resource descriptions.

## Configuring Automatic Emails

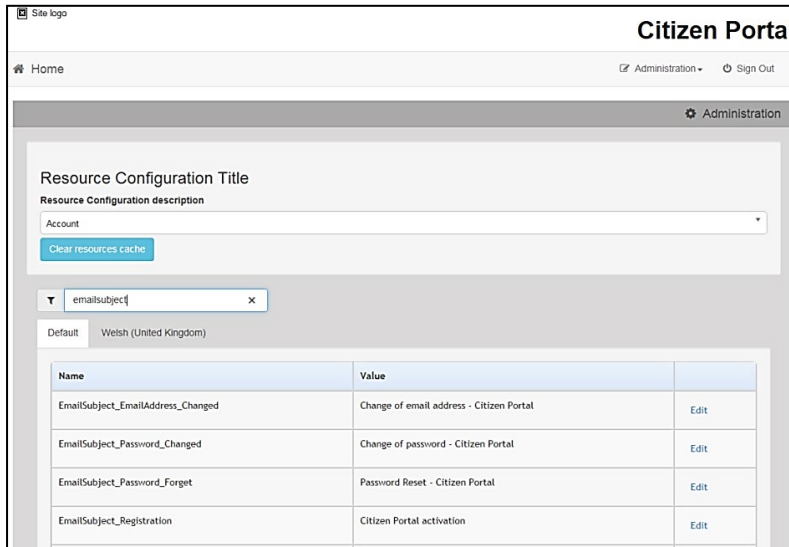
Portal administrators can now configure the text included with automatic emails, sent in response to the following actions in both the One Citizen Portal and the One Professional Portal:

- User indicates that they have forgotten their password
- User changes their password
- User changes their email address
- 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.

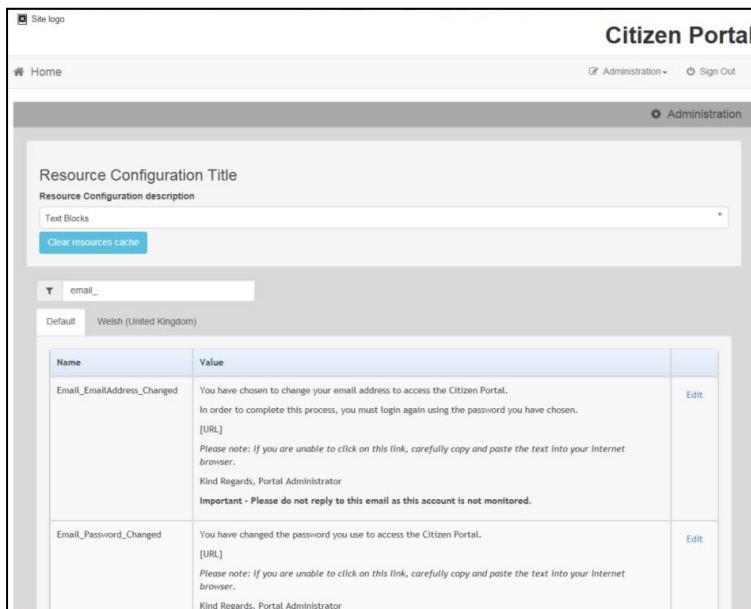
This text can be configured by the portal administrator via **Citizen Portal Administration | Administration | Edit Resources | Resource Configuration Title | Text Resources | Account**. Default text has been automatically configured for each.

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

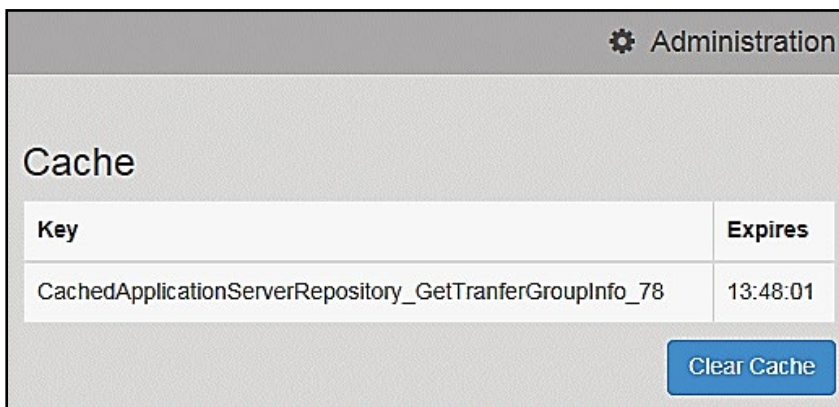
## Cache

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.

## 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.

The screenshot shows two side-by-side configuration panels. The left panel, titled 'ECS Settings', contains several dropdown menus and text input fields: 'ECS Mock Eligibility Status' (set to 'Eligible'), 'ECS Mock Error Status' (set to 'Success'), 'ECS Environment' (set to 'Mock'), 'ECS Local Authority' (with a dropdown arrow), and 'ECS Username' (with a dropdown arrow). The right panel, titled 'ECS Password', features a blue 'Update ECS Password' button. Below it, the 'ECS System Status' section has a blue 'Test' button. The 'ECS Override Settings' section includes a note: 'These 'override' settings will normally be empty. They should only be set after guidance from Capita.' It contains two empty 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.lawebsservice/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).



# 05 | GDPR Administration

## Introduction to GDPR Administration

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



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

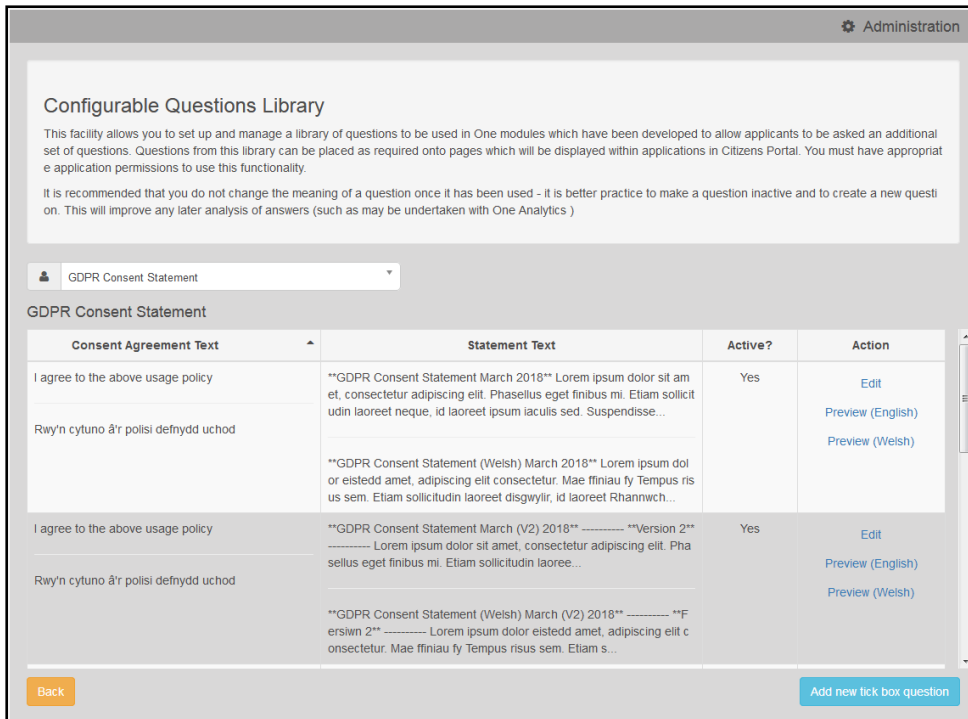
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Citizen Portal		✓		
Administration		✓		
Free School Meals		✓		
GDPR Administration		✓		
PortalAdmin Access	✓			
Thirty Hour Entitlement User		✓		
Transport		✓		
User Management		✓		

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.

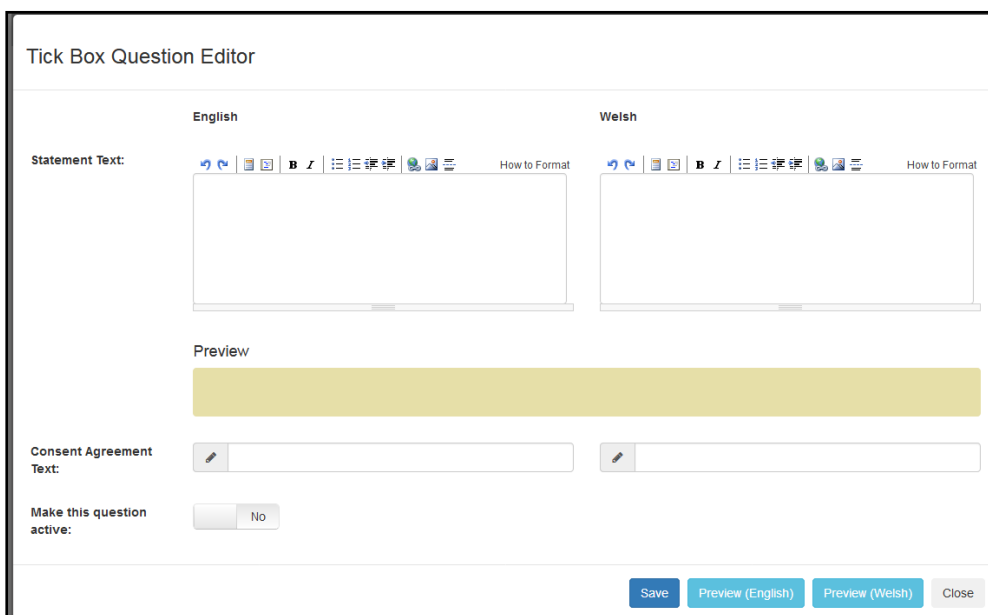
The page is accessed via **GDPR Administration | Configurable Question Library**.



## 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.
11. Ensure that **GDPR Consent Statement** is selected from the drop-down.
12. Click the **Add new tick box question** button to display the **Tick Box Question Editor** window.



13. Enter the **Statement Text** (in either English or Welsh). This text is presented to the Citizen portal user and comprises the Consent Statement.

14. 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.
15. If required, click the **Make this question active** button.
16. If required, click the **Preview (English)** or **Preview (Welsh)** button.
17. 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.

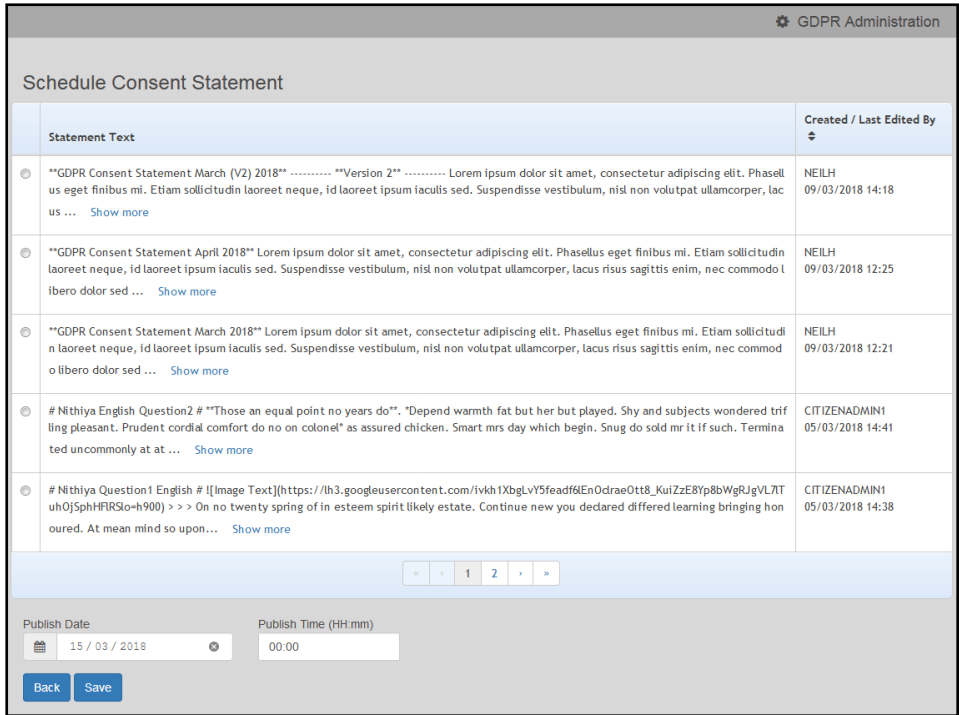
1. Select **GDPR Administration | GDPR Consent Statements** to display the **GDPR Consent Statement Schedule** page.

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 laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	NEILH 09/03/2018 14:16	01/04/2018 00:01	11	<a href="#">Delete</a>
**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 laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	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 laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	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 laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	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 laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	NEILH 09/03/2018 12:36	09/03/2018 12:55	7	

[Add New](#)

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



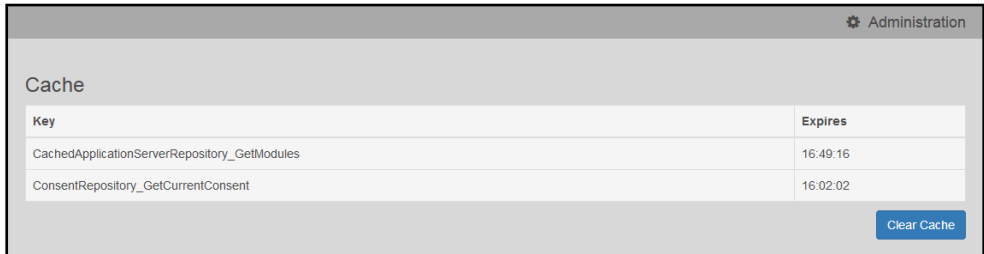


3. Select the radio button adjacent to the required statement and click the **Save** button.

## 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.

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, Greystriars, BEDFORD, Simshire, MK40 1HJ	No Children	09/03/2018 13:47	09/03/2018 14:00	Clara Penneington	Action already taken
8249	Neil		25/12/1976	portal19@onetestsmtmp.co.uk 12, Greystriars, BEDFORD, Simshire, MK40 1HJ	1 Child	09/03/2018 13:20			Mark Actioned

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

PortalStudentId	Name	OnePersonid
15308	Ruth Hall	

4. 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:

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

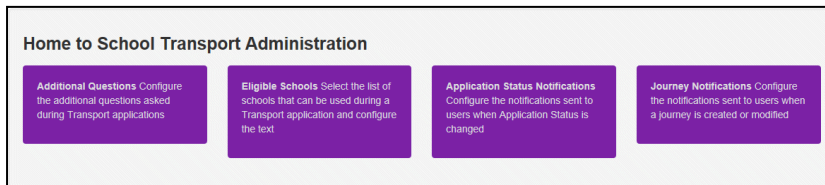
2. Enter search criteria and click the **Search** button to display a history of consents for each person.

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

# 06 | Transport Administration

## Introduction to Transport Administration

Access to the **Transport Administration** page is via **v4 Online | Citizen Portal Admin | Administration**.



Parents, guardians and carers can make an application for transport from home to school and vice versa. Applications are loaded into the One Transport module for processing and batch checking.

Transport applications are made in the Citizen Self Service portal. The students involved in the applications are matched via the Portal Back Office functionality before the applications are loaded into One.

One Transport uses the same import 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**.

Once the dummy base has been created a user is mapped to it. The user's **User\_ID** is used to identify that a record has been received from the Citizen Self Service portal.

In addition, the following settings must be configured in order to enable Transport applications to be made on the Citizen Self Service portal and subsequently processed in One:

- **Additional Questions** – Configure the additional questions asked during Transport applications.
- **Eligible Schools** – Select the list of schools that can be used during a Transport application and configure the confirmation text shown to users.
- **Application Status Notifications** – configure the notifications sent to user when the application status is changed.
- **Journey Notifications** – Configure the notifications sent to users when a journey is created or modified.

For more information on how parents, carers and guardians make a transport application via the Citizen Self Service Portal see the [Making a Transport Application](#) help topic on page 58.

## Creating a Dummy Base in One v4 Client (Transport)

To import transport applications from the Citizen Self Service portal, a dummy base must be created as a B2B Student Base. Next, a user must be mapped to the dummy base in order to identify that a record has been received from the Citizen Self Service portal.

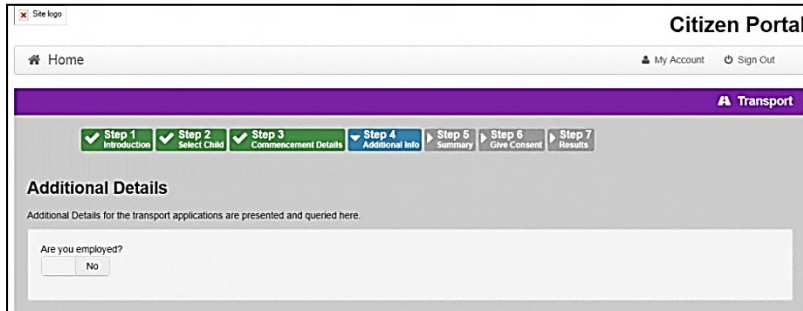
The User\_ID is used to update the Last Updated field in the relevant area of One, identifying that the record was sourced from the Citizen Self Service portal.

The dummy base should have been set up by the One Administrator when configuring the portal in the v4 Client. Contact your One Administrator for the User\_ID set up for processing transport applications.

## Adding Additional Questions (Transport)

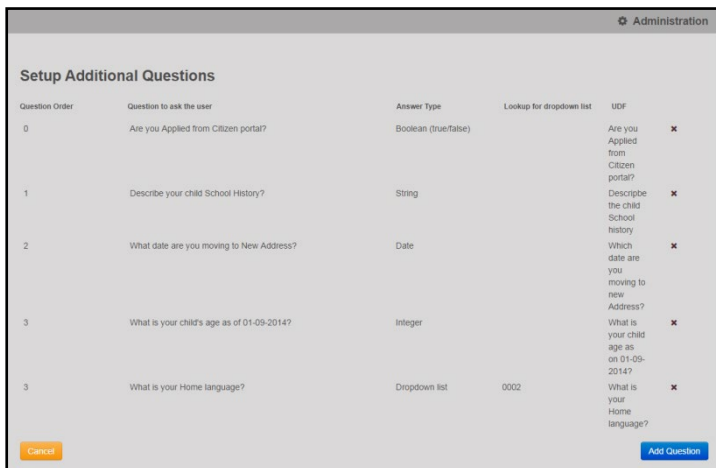
As part of the transport application process, additional questions can be set by the local authority. It is not mandatory to configure additional questions. However, any additional questions that are set must be answered by the applicant before the application can be continued.

When the parent, carer or guardian makes a Transport application, they will see the additional questions on **Step 4 | Additional Info**.

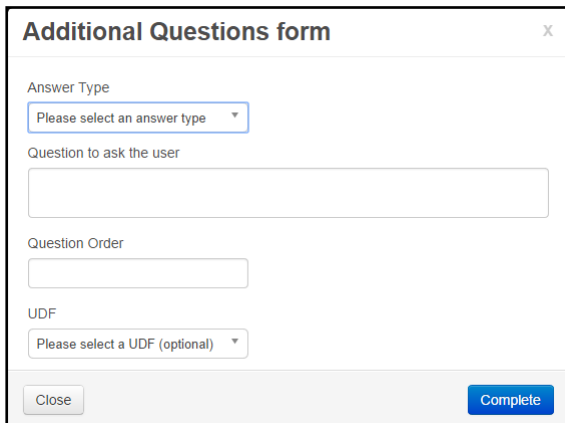


To configure additional questions:

1. Select **One v4 Online | Citizen Portal Admin | Administration**.
2. Click the **Transport Administration | Additional Questions** button to display the **Setup Additional Questions** page. Existing questions are displayed in number order.



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



4. Select an **Answer Type**.

If you select the **Drop-down list** option, the **Lookup for dropdown 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 a duplicate number will be generated. Edit the subsequent question numbers to resolve this issue.

7. If required, select the **UDF** that the question corresponds to.

If you select an option in this field, the answer that the user gives to the question will be populated into the specified UDF.

**NOTE:** UDFs are configured using the **UDF Manager** For more information on configuring UDFs see the **RG Administration\_Managing\_UDFs** reference guide, available from [www.onepublications.com](http://www.onepublications.com) and SupportNet

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

The Answer Types are edited via <b>General Administration   Edit Resources   Resource Configuration Title   Administration</b> .	
String	AnswerType_String
Date	AnswerType_Date
Email	AnswerType_Email
Decimal	AnswerType_Decimal
Drop-down list	AnswerType_DropDown
Boolean	AnswerType_Boolean
Integer	AnswerType_Integer

## Editing an Additional Question

To edit an existing additional question:

1. Select **One v4 Online | Citizen Portal Admin | Administration**.
2. Click the **Transport Administration | 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**.

**Additional Questions form** x

Answer Type

Lookup for dropdown list

Question to ask the user

Question Order

UDF

4. Make the required changes. All of the fields can be edited.

5. Click the **Complete** button.

The Answer Types are edited via <b>General Administration   Edit Resources   Resource Configuration Title   Administration.</b>	
String	AnswerType_String
Date	AnswerType_Date
Email	AnswerType_Email
Decimal	AnswerType_Decimal
Drop-down list	AnswerType_DropDown
Boolean	AnswerType_Boolean
Integer	AnswerType_Integer

## Configuring Eligible Schools (Transport)

Not all schools are supported by local authorities for transport. The **Eligible Schools** option enables your local authority to configure groups of bases that can be selected by the Citizen Self Service portal user when applying for transport for their child.

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

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

Eligible schools and base groups are configured via **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Eligible Schools.** There are two parts to configuring eligible schools:

- Configure Transport Schools
- Configure Base Groups.

## Configuring Transport Schools

To configure the list of schools that are supported by the LA for transport:

1. Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Eligible Schools** to display the **Configure Transport Schools** page.

2. On the **Configure Transport Schools** panel, highlight the base group to be added to the Transport supported list and then click the **Add** button to transfer the base group to the **Base Groups for Transport** panel.
3. Click the **Save** button. The base group displays in the **Configure Base Groups** panel.

## Configuring Base Group Display Text

Base groups can be configured to display text to the Citizen Self Service portal user when that user selects a school belonging to a particular base group as part of their transport application.

This feature enables the local authority to immediately inform the parent, guardian or carer whether the chosen school is supported in their transport application. Additional information is provided to explain why their chosen school is or is not supported. This is useful, for example, if the local authority provides transport to mainstream schools, but not to faith schools.

To configure base group display text:

1. Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Eligible Schools** to display the **Configure Transport Schools/Configure Base Groups** page.
2. On the **Configure Base Groups** panel, click the required base group button to display the message options for the base group.

3. Ensure that the **Proceed Allowed** button is set to the **ON** position.
4. Enter the required text in the **Base Group Text** field. The formatted message is displayed below the memo field.
5. Click the **Save** button to return to the **Configure Transport Schools** page.

A confirmation message confirms that your changes have been saved. Click the cross to remove the message.

## Configuring Application Status Notifications

Updates are sent to the relevant parent, carer or guardian when a transport application is processed in the Citizen Self Service portal

The **Application Status Notifications** page enables the local authority to configure which status is displayed to the Citizen Self Service user at each stage of the application process.

The page also enables the local authority to define which message templates are sent to the user when the status of an application changes.

For information on changing the content of the message templates themselves, see the *Template Management* topic in the *General Administration* chapter.

**NOTE:** Message details are not sent directly to the Citizen Self Service portal user. A notification is sent to the user's email address, 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.



- Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Application Status Notifications** to display the **Transport Application Status Notifications** page.

In Progress Configurations		Submitted Configurations	
Portal Display Status	Message Template	Portal Display Status	Message Template
In Complete	<Not Required>	Submitted	Application Status - Submitted
Approved Configurations			
Application Status	Portal Display Status	Message Template	
APPROVED	Eligible	Application Status - Approved	
Pending Configurations			
Application Status	Portal Display Status	Message Template	
PENDING	In Progress	Application Status - Pending	
Rejected Configurations			
Application Status	Portal Display Status	Message Template	
REJECTED	Refused	Application Status - Rejected	

Cancel

- Select the status configuration you wish to edit notifications for. There are five available options:
  - In Progress Configurations:** Applications which are incomplete (i.e. not yet submitted).
  - Submitted Configurations:** Applications which have been submitted but have not yet been added to Transport Back Office.
  - Approved Configurations:** Applications with a status code of **Approved**.
  - Pending Configurations:** Applications with a status code of **Pending**.
  - Rejected Configurations:** Applications with a status code of **Rejected**.

The **Add/Edit Transport Application Status Configuration** dialog is displayed.

**NOTE:** Applications can be rejected from the Citizen Self Service portal itself (if they contain conflicting address or person data that is subsequently discarded from Portal Back Office during the import process) as well as from One Transport Back Office. The applicant will receive the communication in either case.

### Add/Edit Transport Application Status Configuration x

Application Status Code: APPROVED ▼

Select Display Code: Eligible ▼

Select Message Template: Application Status - Approvec ▼

Cancel Save

- Select the **Display Code** you wish to use for the selected configuration.

This is the status code that will be displayed to the user in the Citizen Portal when the user's application reaches the selected stage.

- Select the **Message Template** you wish to use for the selected configuration

This is the message that will be sent to the user when the status of their application changes to the selected stage.

**NOTE:** The **Message Template** field does not display when editing **In Progress Configurations**.

- Click the **Save** button to save your changes and close the dialog.

## Configuring Journey Notifications

Journey Notifications enable LAs to notify Citizen Self Service portal users when a journey related to their application is either created or updated.

This section deals with configuring the circumstances in which a message would be sent to a user. For information on changing the content of the message templates themselves, see the *Template Management* topic in the *General Administration* chapter.

**NOTE:** Message details are not sent directly to the Citizen Self Service portal user. A notification is sent to the user's email address, 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.

## Adding a Journey Notification

- Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Journey Notifications** to display the **Journey Notifications** page.

Mainstream Configurations		
Entitlement Code	Configuration Type	Message Template
	Modified	Mainstream - Modified
	Created	Mainstream (Created)
<a href="#">Add New</a>		

Door to door Configurations		
Entitlement Code	Configuration Type	Message Template
	Created	DTD -Created
	Modified	DTD - Modified
<a href="#">Add New</a>		

Own Travel Configurations		
Entitlement Code	Configuration Type	Message Template
	Created	Own Travel - Created
	Modified	Own Travel - Modified
<a href="#">Add New</a>		

[Cancel](#)

- Click the **Add New** button in either the **Mainstream Configurations**, **Door to door Configurations** or **Own Travel Configurations** sections, depending on the type of journey notification you wish to create. The **Add/Edit Journey Notification Configuration** dialog is displayed.

3. Select an **Entitlement Code**. Only journeys that correspond to an assessment or application with the chosen entitlement code will trigger the notification.
4. Select a **Configuration Type**. The available options are **Created** and **Modified**.
5. Select a **Message Template** for the notification.
6. Click the **Save** button to create the notification and close the dialog.

## Editing a Journey Notification

1. Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Journey Notifications** to display the **Journey Notifications** page.

Mainstream Configurations		
Entitlement Code	Configuration Type	Message Template
	Modified	Mainstream - Modified
	Created	Mainstream (Created)
<a href="#">Add New</a>		
Door to door Configurations		
Entitlement Code	Configuration Type	Message Template
	Created	DTD -Created
	Modified	DTD - Modified
<a href="#">Add New</a>		
Own Travel Configurations		
Entitlement Code	Configuration Type	Message Template
	Created	Own Travel - Created
	Modified	Own Travel - Modified
<a href="#">Add New</a>		
<a href="#">Cancel</a>		

2. Select a notification to display the **Add/Edit Journey Notification Configuration** dialog.

**Add/Edit Journey Notification Configuration** x

Select Entitlement Code: Examinations

Select Configuration Type: Modified

Select Message Template: Mainstream (Created)

Buttons: Cancel, Save

3. Make the required edits.

**NOTE:** Each of the journey types (Mainstream, Own Travel and Door-to-door) has pre-populated notifications for created and modified journeys. You can only edit the **Message Template** used in these notifications. The **Entitlement Code** and **Configuration Type** field are disabled.

4. Click the **Save** button to save your changes and close the dialog.

## Deleting a Journey Notification

1. Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Journey Notifications** to display the **Journey Notifications** page.
2. Click the cross next to the notification you wish to delete. A confirmation dialog is displayed.

Mainstream Configurations		
Entitlement Code	Configuration Type	Message Template
	Modified	Mainstream - Modified
	Created	Mainstream (Created)
Examinations	Modified	Mainstream (Created)

Buttons: Add New

A red square with a white 'x' icon is highlighted with a black arrow, indicating the delete action for the 'Examinations' row.

3. Click the **Confirm** button to delete the notification and close the dialog

**NOTE:** You cannot delete the pre-populated journey notifications.



# 07 | Transport Applications

## Introduction to Transport Applications

The **Applications** area of the Citizen Self Service portal enables local authority teams to review online applications for transport. The applications are then imported into the One Transport module.

For more information on how parents, carers and guardians make a transport application via the Citizen Self Service Portal see the [Making a Transport Application](#) help topic on page 58.

## Transport Applications

When a transport application is made via the Citizen Self Service portal, any child that could not be matched to a One student is processed via **v4 Online | Portal Back Office | Data Transfer**. This screen is also used to process matched children who have some conflicting data with the child they are matched to. The incoming students are listed under the Transport Dummy Base.

If an application has conflicting person or address data and that data is discarded during the import process, the application will automatically be rejected. Applications that have been rejected from the portal are shown in **One v4 Online | Citizen Portal Admin | Local Authority | View All Applications**.

**More Information:**

*Matching Students via One Portal Back Office Handbook*, available from [www.onepublications.com](http://www.onepublications.com).

## Managing Transport Applications

Applications for Transport can be reviewed on the Citizen Self Service portal.

For more information on how parents, carers and guardians make a transport application via the Citizen Self Service Portal see the [Making a Transport Application](#) help topic on page 58.

## Searching for a Transport Application

To search for a Transport application:

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

**Citizen Portal**

Home Local Authority Administration

Local Authority

**Applications**

Search Filters :

Name  Reference Number

From  To

Application Type

25 applications

Claimant Name	Dependent Name - Test TS	Date Submitted	Email	Application Type	Portal Display Status	Reference Number - Test TS
Dr	John	23/10/2013	test@one.co.uk	TRA	In Progress	TRA-1310-A9G41CT7

## Transport Applications

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

5. 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 - TRA.
  - **From** – select a date from the drop-down.
  - **To** – select a date from the drop-down.
  - **Application Type** – click the drop-down and select from **Transport**.
6. 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
Dr [Name]	[Name]	23/10/2013	[Email]	TRA	Eligible	TRA-1310-YJLTMRT2
Mrs [Name]	[Name]	23/10/2013	[Email]	FSM	In Progress	FSM-1310-BSVG9GF3
[Name]	[Name]	23/10/2013	[Email]	TRA	Submitted	TRA-1310-A9G41CT7
[Name]	[Name]	23/10/2013	[Email]	FSM	Refused	FSM-1310-FM6ZF5F3

## Reviewing Transport Applications

To review Transport applications:

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


Claimant Name	Dependent Name	Date Submitted	Email	Application Type	Portal Display Status	Reference Number
Dr [Name]	[Name]	23/10/2013	[Email]	TRA	Eligible	TRA-1310-YJLTMRT2
Mrs [Name]	[Name]	23/10/2013	[Email]	FSM	In Progress	FSM-1310-BSVG9GF3
[Name]	[Name]	23/10/2013	[Email]	TRA	Submitted	TRA-1310-A9G41CT7
[Name]	[Name]	23/10/2013	[Email]	FSM	Refused	FSM-1310-FM6ZF5F3

Optionally, 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
  - Requested start date
  - Disbursement

- Special Transport Needs
  - Transport Destination
  - Address that Transport is required from
  - 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 or Transport questions. For more information, see [Adding Additional Questions \(Transport\)](#) on page 32.
3. Click the **Close** button to return to the **Applications** browse list.





# 08 | 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 56.

The parent, carer or guardian will receive messages from the local authority regarding the status of their application. For more information, see [Messages](#) on page 63.

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 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.

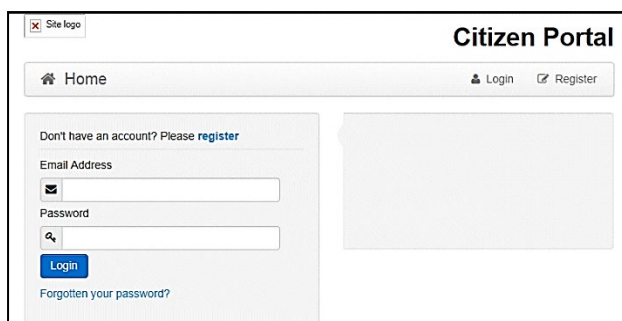
## Creating an Account

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.

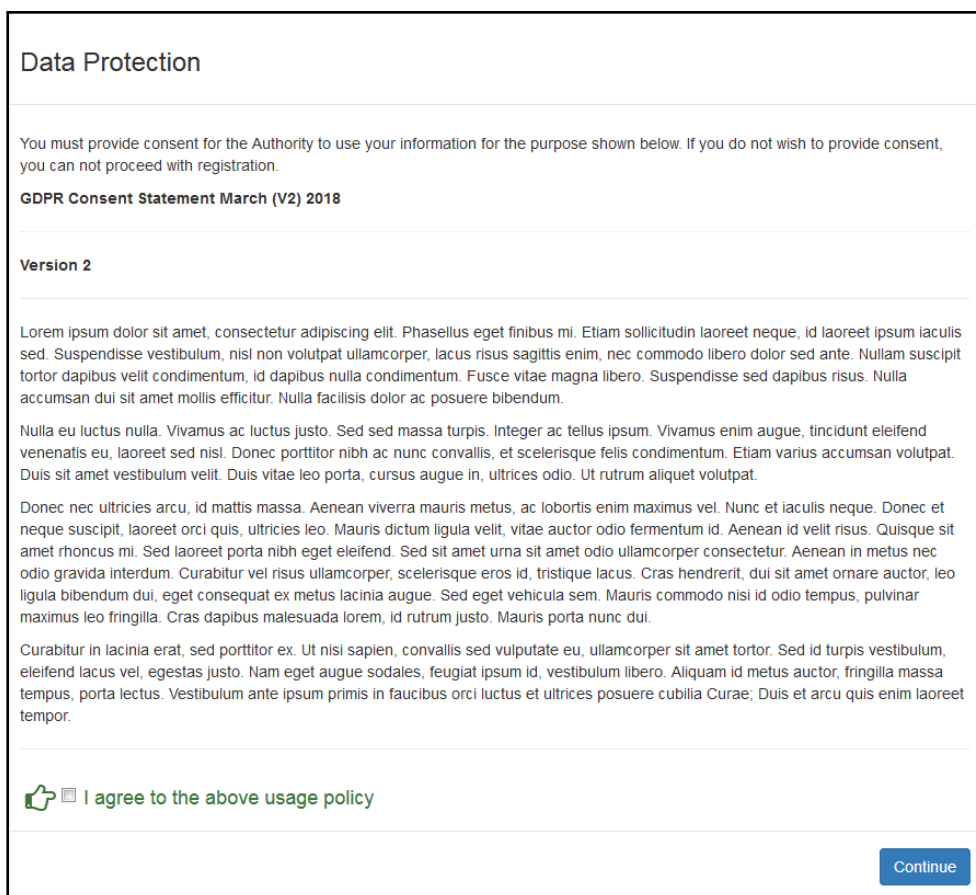
When they register, they will be asked to agree to the GDPR Consent Statement.

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.



3. Read the contents of the statement. Select the check box to agree to the GDPR Consent Statement and click the **Continue** button to display the **Registration** page.
4. Enter the **\*Required field** security information: **Email Address**, **Confirm Email**, **Password** (click the **Show** button to view the password as you type), **Title**, **Forename**, **Surname**, **Gender**.

### Registration

You need to first register with us before you can use our services. To register, you need to provide the following information:

\* Required field

**Email Address \***

**Confirm Email \***

**Password \***

**Title \***

**Forename \***

**Surname \***

**Gender \***

If you need help with your address, use the Post Office's [Postcode Finder](#).

**Find Address**

5. To find your address, enter your full postcode and click **Search**.  
If you need help with your address, use the Post Offices's [Postcode Finder](#).
6. Select an address from the list.
  - a. If the address you have selected is incorrect, click the **Use Another Address** button to search again.
  - b. If your address is not in the list, click the **Not able to find your address?** button.

<b>House Number</b>	<input type="text" value="100"/>
<b>House Name</b>	<input type="text"/>
<b>Building Name</b>	<input type="text"/>
<b>Street Name</b>	<input type="text" value="100/100/100"/>
<b>District / Village</b>	<input type="text"/>
<b>Town</b>	<input type="text" value="100/100"/>
<b>County</b>	<input type="text"/>
<b>Postcode *</b>	<input type="text" value="100/100"/>
<b>Country</b>	<input type="text" value="Please select"/>

- c. Enter the new address details; **Postcode** is mandatory
7. The **Home Phone**, **Mobile Number** and **Work Phone** are optional.

## Making Applications

Please supply a telephone number where you can be contacted during normal office hours, if necessary.

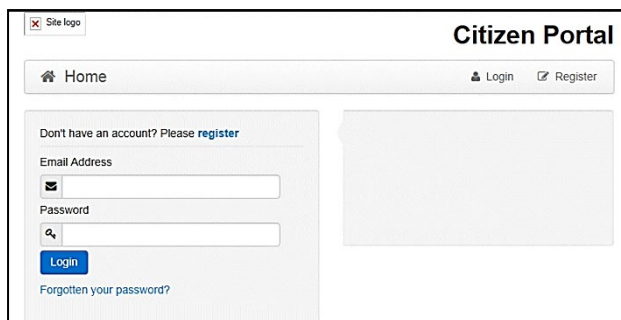
Home Phone	<input type="text"/>
Mobile Number	<input type="text"/>
Work Phone	<input type="text"/>

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



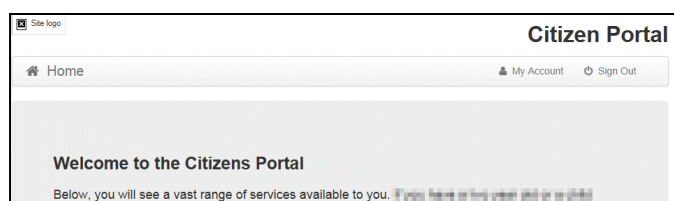
**Note:** The **Announcements** page displays only if the local authority has set up any announcements regarding the portal.

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**.

5. Click the **Continue** button to display the **Home** page.
6. If the LA has updated its **Data Protection Consent Statement**, a **Data Protection** dialog is displayed.
  - i. On the **Data Protection** dialog, select the checkbox to agree to the confirmation.
  - ii. Click the **Continue** button. A confirmation message displays to conform your consent

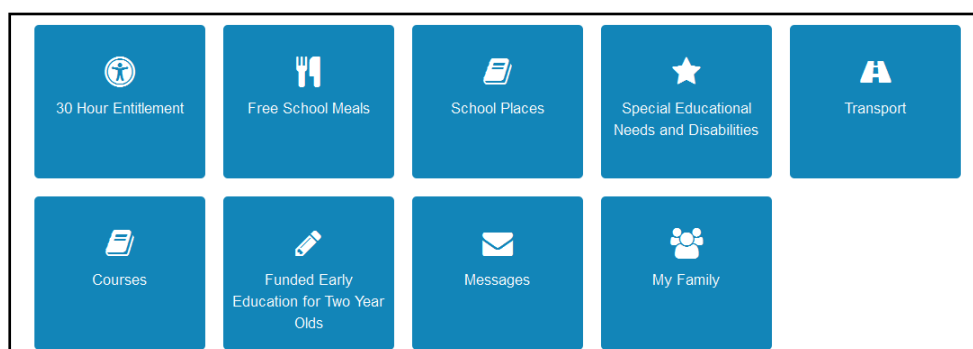
**Important Note:** It is now possible to enable a second verification step to increase your security.

## 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 of Circumstances**

## Making Applications

- **Two Step Verification**
- **Consent History**
- **Withdraw Consent.**

For more information, see [My Account](#) on page 50.

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 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.

**Personal Details**

**Title**

**Forename**

**Surname**

**Gender**

Save

5. Click the **Save** button.

**NOTE:** A validation message is displayed if any of the personal details are changed.

## Contact Details

To edit 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**.

**Contact Details**

Use Another Address

**Address**

Home Phone

Mobile Number

Work Phone

Save

4. To edit your address, click **Use Another Address** to display the **Find Address** dialog.
5. Enter your full postcode and click the **Search** button to display a list of addresses for your postcode.



## Making Applications

The screenshot shows the 'Contact Details' form. At the top, there is a 'Find Address' section with a search input field containing 'mk42 9jp'. Below the input is a list of search results: 'Amphill Road, BEDFORD, Simshire, MK42 9JP', 'Flat 1, 1-3, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP', '100, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP', '101, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP', and '102, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP'. Below the list is a button labeled 'Not able to find your address?' and a blue 'Search' button. Underneath are fields for 'Home Phone' (01234567891), 'Mobile Number' (07796232333), and 'Work Phone'.

- Select your address from the list (you may need to scroll down). There is no limit to the number of addresses that are displayed in the search results list.
- If your address is not in the list, click the **Not able to find your address?** button.
- Enter the new address details. Click in a field to display the relevant tooltip.

The screenshot shows the 'Contact Details' form with a blue button at the top labeled 'Use Another Address'. Below this are several address fields, each with a house icon: 'House Number' (1), 'House Name', 'Building Name', 'Street Name', 'District / Village', 'Town', 'County', and 'Postcode'. There is also a 'Country' dropdown menu with 'Please select' and a downward arrow. At the bottom are fields for 'Home Phone', 'Mobile Number', and 'Work Phone'. A blue 'Save' button is located at the bottom left of the form.

- 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.

5. Click the **Next** button.
6. 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 \***

🔑

7. 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 your **Current Password**.  
Use the **Show** button to view your password as you type.
5. Enter your **New Password**.  
Use the **Show** button to view your new password to confirm it matches your previous password..
6. 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

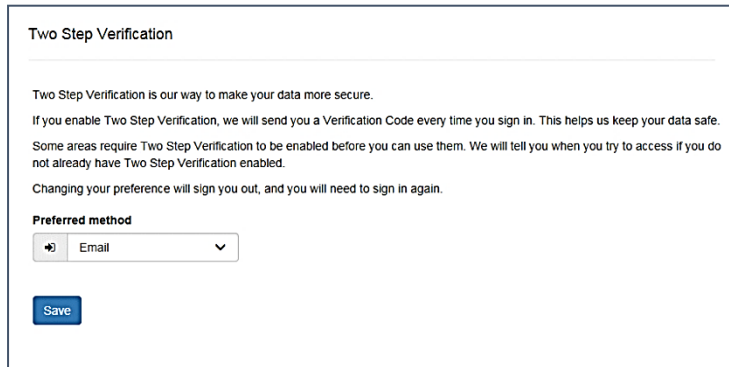
Two step verification is an additional process to increase your security when logging onto the Citizen Portal.

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

## Enabling Two Step Verification

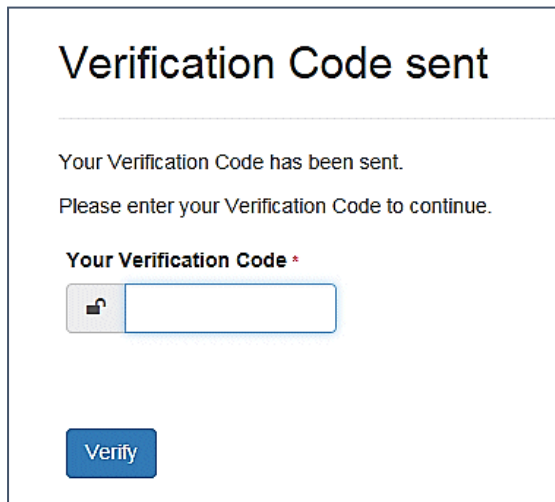
To set up two step verification:

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.**



The screenshot shows a web form titled "Two Step Verification". It contains the following text: "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." Below this text is a section labeled "Preferred method" with a dropdown menu currently set to "Email". At the bottom of the form is a blue "Save" button.

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:



The screenshot shows a dialog box titled "Verification Code sent". It contains the text: "Your Verification Code has been sent. Please enter your Verification Code to continue." Below this is a label "Your Verification Code \*" followed by a text input field with a lock icon on the left. At the bottom of the dialog is a blue "Verify" button.

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.

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.

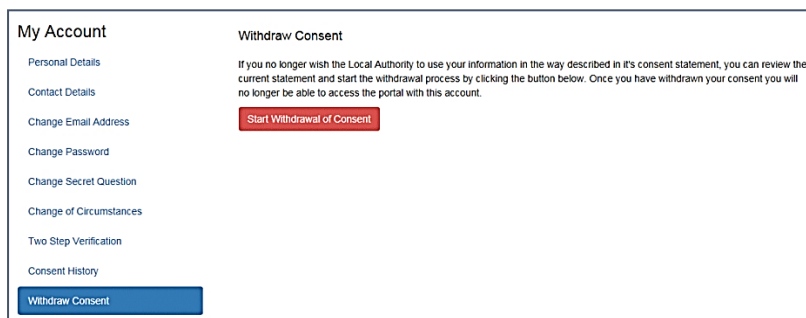
Local Authority Consent Statement	You consented on:
	12/12/2023
	12/12/2023

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:

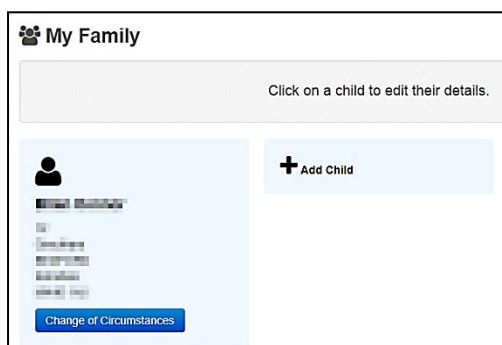
You have previously agreed to the authority's most recent Data Protection Consent Statement.  
If you wish to withdraw your consent, click the withdraw button below.
6. Click the **Withdraw my consent** button to display the **Decline** dialog.

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:

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.

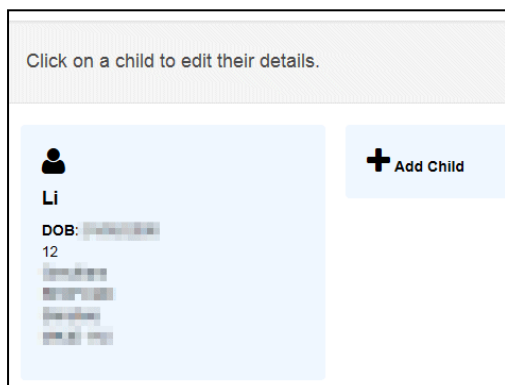
## My Family

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 57.

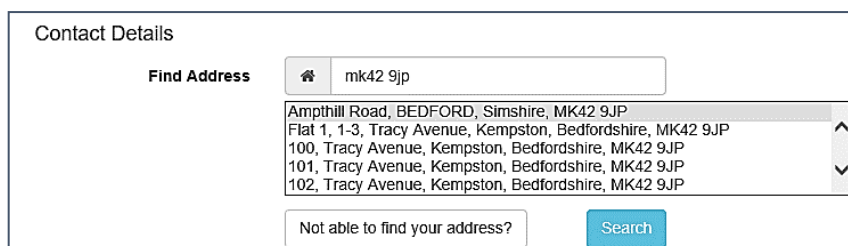
## Adding a Child

To add a child to a parent's account:

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

2. Enter the required information about the child.
  - a. If the child's address is listed, then select the address.
  - b. If the child lives elsewhere, select the **Click to add new address** button to display the **Find Address** dialog.
    - i. Enter the full **Postcode** and click **Search** to display the list of addresses matching your postcode.

## Making Applications



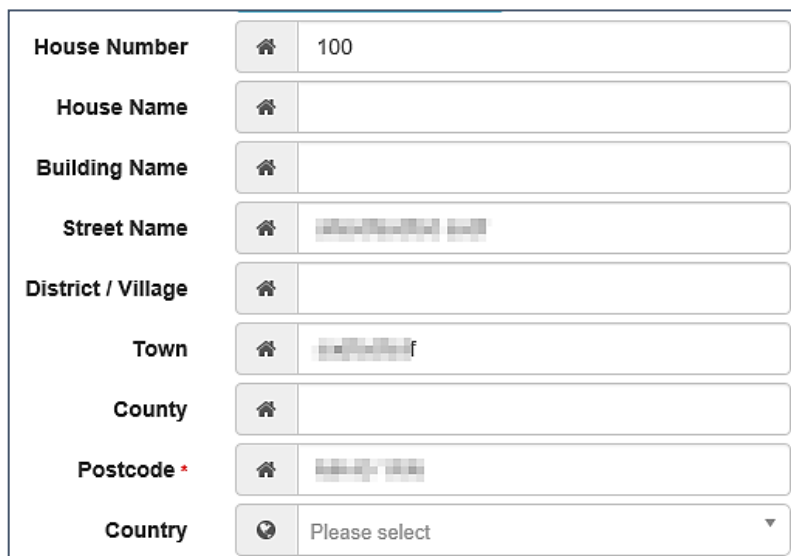
Contact Details

Find Address

- Ampthill Road, BEDFORD, Simshire, MK42 9JP
- Flat 1, 1-3, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP
- 100, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP
- 101, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP
- 102, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP

[Not able to find your address?](#)

- ii. Select the address (you may need to scroll down).
- iii. If your address is not listed, click the **Not able to find your address?** button.
- iv. Enter the new address details. **Postcode** is mandatory.



House Number	<input type="text" value="100"/>
House Name	<input type="text"/>
Building Name	<input type="text"/>
Street Name	<input type="text" value="100"/>
District / Village	<input type="text"/>
Town	<input type="text" value="100"/>
County	<input type="text"/>
Postcode *	<input type="text" value="100"/>
Country	<input type="text" value="Please select"/>

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.

## Applications

Parents, carers and guardians can make applications for school places, free school meals, transport, courses and funded early education for two year olds via the One Citizen Self Service portal.

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

## Making a Transport Application

The **Transport Applications** area of the Citizen Self Service portal enables online applications for transport to be reviewed by the local authority teams. The applications are then imported into the One Transport module.

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

To make a transport application, the parent completes the following procedure:

1. Select **Citizen Portal | Home | Transport**.

- 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 | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | TRAIIntroduction.**

- Click the **Continue** button to display the **Step 2 Select Child** page.

If a required child/dependent is not already listed, click the **Add Child** button, to add them. For more information, see the *Adding a Child* topic.

- Select a child to display the **Step 3 Commencement Details** page.
- Enter the transport details.

The address that transport is required from is displayed.



## Making Applications

Address that Transport is required from  
200, , , Wilstead Road, Elstow, Bedford, MK42 9YF

If you require transport from an address different than the one above please enter a postcode to search for a different address

6. If you require transport from a different address, enter the full postcode and click **Search**.

**NOTE:** Applicants can only select their home address (that has been already recorded in the Citizen Self Service portal) or a pre-existing address from One. They cannot enter a free-form address. It is recommended that you provide an alternate contact method in case the applicant cannot find the address they need.

7. If the parent selects the box to apply for transport on the grounds of low income, they must select one of the following options:

If you are applying for transport for your child under the grounds of low income, click below.

Please select one of the options below:

I am entitled to free school meals

I will be supplying an alternative form of evidence to support my application

8. The following dialog is displayed to enable the applicant to apply for **Free School Meals**, if required.

If you are applying for Home to School Transport on the grounds of Low Income, then you may also be eligible for Free School Meals. You can make an application for Free School Meals by following this link: [Free School Meals Application](#), or by starting a new Free School Meals application from the home page once you've completed this Transport application.

**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 | TransportFSMApplicationText**.

9. Click the **Continue** button to display the **Step 4 Additional Info** page.

**Transport**

Step 1 Introduction ✓ Step 2 Select Child ✓ Step 3 Commencement Details ✓ Step 4 Additional Info Step 5 Summary Step 6 Give Consent Step 7 Results

**Additional Details**

Additional Details for the transport applications are presented and queried here.

Have you applied for school Transport before?

No

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 configured here are mandatory and must be answered by the applicant before the application can continue.

Additional questions are configured by the local authority via **One v4 Online | Citizen Portal Admin | Administration | Transport Administration.| Additional Questions**. For more information, see the [Adding Additional Questions \(Transport\)](#) help topic on page 32.

10. Answer any additional questions.
11. Click the **Continue** button to display the **Step 5 Summary** page.

**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 | TransportApplicationSummary**.

12. Click the **Print this page** button to print the **Application Summary** page.
13. Click the **Continue** button to display the **Step 6 Give Consent** page.

## Making Applications

Transport

Step 1 Introduction ✓ Step 2 Select Child ✓ Step 3 Commencement Details ✓ Step 4 Additional Info ✓ Step 5 Summary ✓ Step 6 Give Consent Step 7 Results

### Declaration by Parent/Carer

I agree to notify the County Council - Education Transport and Awards immediately if my child should fail to attend the school for any reason, for

I confirm that I have read and agree to the declaration.

Back Accept

**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 | TransportDeclaration / TransportAcceptTandCText.**

14. Select the check box to confirm that you have read and agree to the declaration.
15. Click the **Accept** button to display the **Step 7 Results** page.

Transport

Step 1 Introduction ✓ Step 2 Select Child ✓ Step 3 Commencement Details ✓ Step 4 Additional Info ✓ Step 5 Summary ✓ Step 6 Give Consent Step 7 Results

### Application Complete

Application Reference for your information:  
TRA-1401

The application reference above will help us with enquiries -

Finish

**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 | EligibilityStatusFurtherInformation.**

16. Click the **Finish** button to return to the **Home** page. The transport application is displayed with a status of **Application Submitted**.

Application Reference Number  
TRA-1407

Application Submitted

[View most recent application](#)

17. Optionally, click the **View most recent application** link to see the **Application Summary** details.

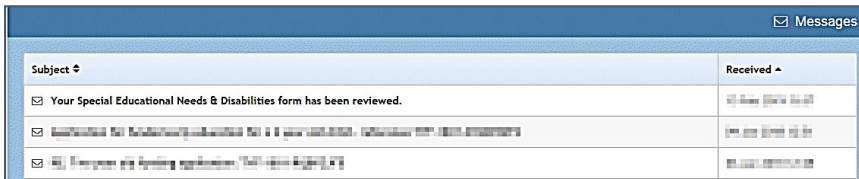
## Messages

Messages are sent from the local authority, informing the parent, carer or guardian of the status of their application; keeping them informed of all processes relating to their child.

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. If information is required to complete an application, click the link to the form.

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