oneeducation

Early Years - Thirty Hour Entitlement Citizen Portal

last updated for the Spring 2020 (3.71) release

Handbook

CAPITA

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Early Years - Thirty Hour Entitlement Citizen Portal Handbook/Spring 2020 (3.71)/28-02-2020

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01 | **Document Change Control**

Date	Release	Description
Spring 2020	**3.71**	**Site Logo and Header text** Portal administrators can now configure the site logo and header text so that they do not get overwritten during upgrades. See *Editing Resource Descriptions* on page *21*.
		Administration | General Administration | Edit Resources When editing resource descriptions, the Resource Culture now shows EN or CY depending on which tab is selected.
		In order to comply with Welsh regulations, Welsh LAs must provide versions of all pages of their websites in both English and Welsh. For example: https://www.local-authority.gov.uk/**en**/CitizenPortal https://www.local-authority.gov.uk/**cy**/CitizenPortal
		When starting a new registration on Citizen portal, or there is an update to the GDPR, there is an option to change the language selection on the GDPR pop-up to display either English or Welsh so that it can be read in the user's preferred language.
		In Citizen Portal the contrast between foreground and background colors have been checked to ensure they meet WCAG 2 AA contrast ratio thresholds across all pages.
		References to CY-GB will display as CY.
Autumn 2019	**3.70**	**Thirty Hour Share Filter** The Thirty Hour Share filter on Citizen Portal has been amended to not display postcodes for providers with the service type of Childminder

Date	Release	Description
August 2019	3.69.007	Changes have been made to the **Find Address** functionality throughout the **One Citizen Portal** for this hotfix: ■ When registering for a Citizen Portal account, a link is available to the Post Office Postcode Finder website to help you with your address. ■ A <u>full</u> postcode must be used to search for an address. ■ Only addresses matching the <u>full</u> postcode are displayed in the search results. ■ If the address you require is not on the LA's database, a **Not able to find your address?** button is available to add the new address details. ■ You <u>must </u>use the **Search** button and <u>not</u> the **Enter** key to search for an address. ■ There is no limit to the number of addresses that are displayed in the search results list. See *Creating an Account* on page *33* See *Contact Details* on page *38* See *Adding a New Child* on page *46* A parent or guardian can add a child (and address) directly within the **Thirty Hour Entitlement Portal,** without having to navigate back to the main **My Family** page. See *Adding a New Child* on page 46
Summer 2019	3.69	The **Secret Question** and **Answer** have been removed from the Registration, My Account and Forgotten Password processes to simplify the login process.
		A **Show** button now enables citizens to see their password as they type.
		Validation messages are displayed when the Title, Forename, Surname or Gender are changed on any of the **Personal Details** pages.
		The **Address Selection** process has been improved; users can now select an address from a known list instead of adding it manually.
		A **partial postcode search** has been introduced to improve the **Find Address** process. An address can now be found using the Street name.

Date	Release	Description
		If an address is changed, a validation message is displayed on any of the **Contact Details** pages.
		The 'white-space' has been trimmed on all form submissions, e.g "Ian" and "Ian ". This will prevent conflicts when matching data.

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**.
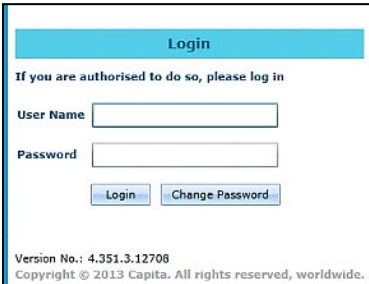
More Information:

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.

Chapter 5 describes how the parent, carer or guardian uses the portal to check the validity of their 30-hour code and share the results with their chosen providers.

03 | **Managing Users**

Citizen Self Service Portal Administrator

In order to be a Citizen Self Service Portal administrator, you <u>must</u> 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.

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

Login
If you are authorised to do so, please log in
User Name
Password
Login   Change Password
Version No.: 4.351.3.12708
Copyright © 2013 Capita. All rights reserved, worldwide.

2. Enter your **User Name**; this is the same as your v4 Client user name.

3. Enter your **Password**; this is the same as your v3 password. Passwords are case sensitive. To change your password, see Changing a Password on page *8*.

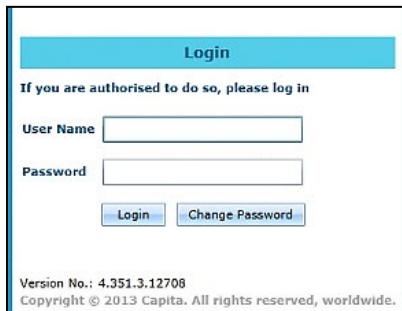4. Click the **Login** button to display the **Welcome to One** page.
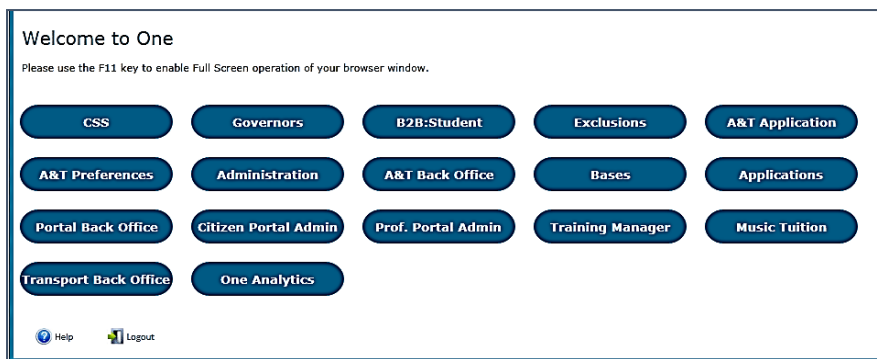
The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

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.
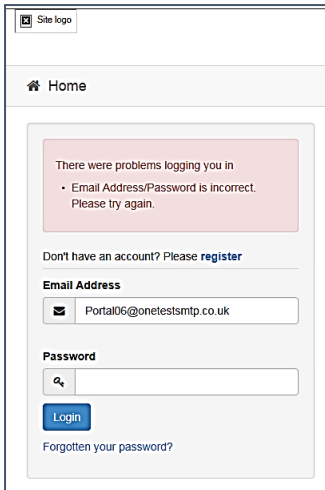
To reset a password:

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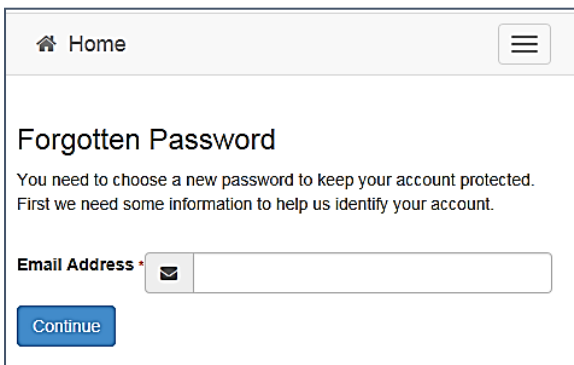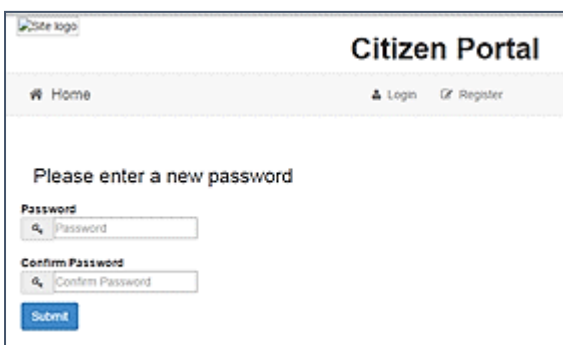

2. Enter your email address, then click the **Continue** button.

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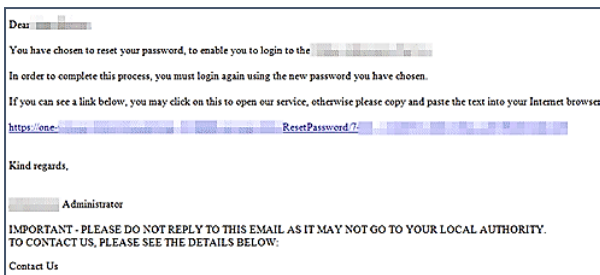
3. Click the link in the email to access the Citizen Portal website.

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

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 Permission**s.

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

1. Log in to v4 Online. For more information see .
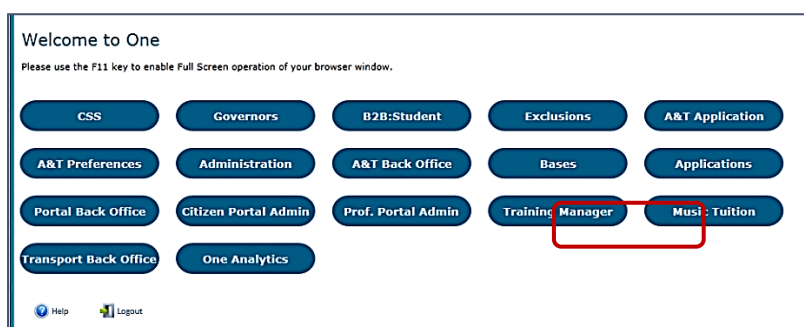
2. Click the **Citizen Portal Admin** button to display the **Announcements** page.
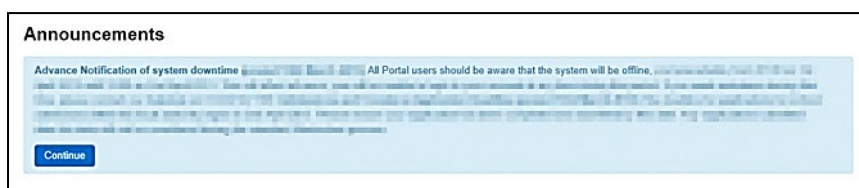
The **Announcements** page displays only if there are announcements regarding the portal.

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.
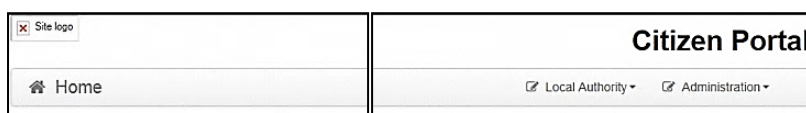
The Citizen Portal Home Page

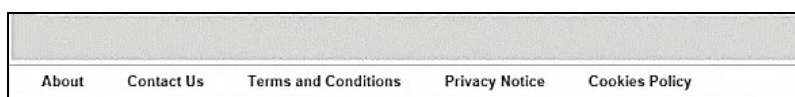The **Citizen Portal Home** page is divided into the following sections:

- **Administration** – for more information, see the [Home | Administration Page](#) section on page *11*.

- **Local Authority** – for more information, see the [Home | Local Authority Page](#) section on page *12*.

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.

☒ Site logo	**Citizen Portal**
🏠 Home	☑ Local Authority ▾ ☑ Administration ▾

The Citizen Portal footer displays the following links:

About	Contact Us	Terms and Conditions	Privacy Notice	Cookies Policy

- **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 12.

User Management (Local Authority)

The User Management page enables the administrator to view user details and to change their email address and 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 v**4 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
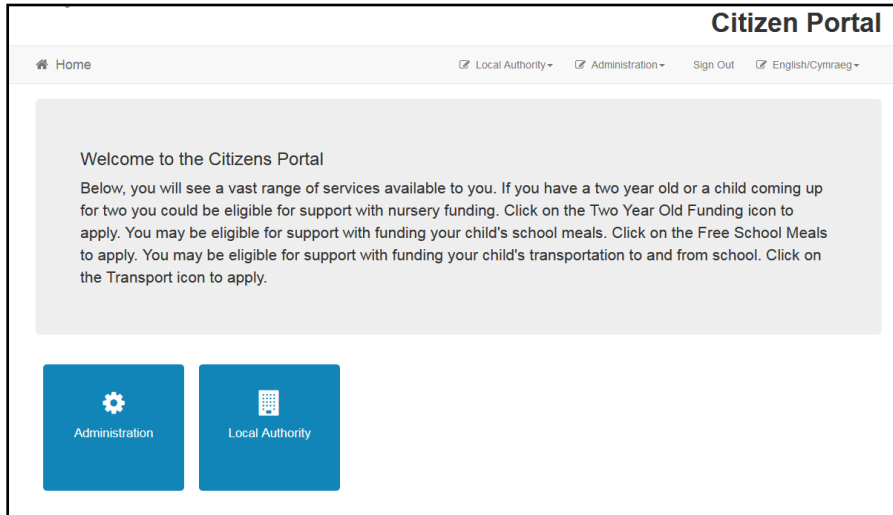
The **Citizen Portal Home** page enables you to access the following functionality:

- 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:
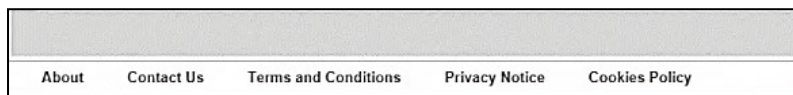
- **About Us** – displays information about the local authority. This text is formatted via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_About**.

- **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:
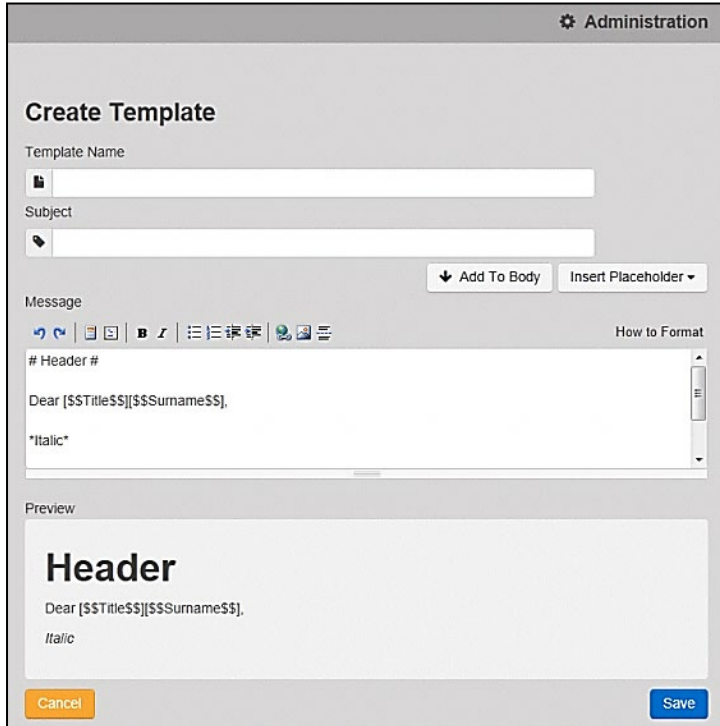
1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Template Management**.

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.

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.

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

Viewing Templates

To view an existing template:

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

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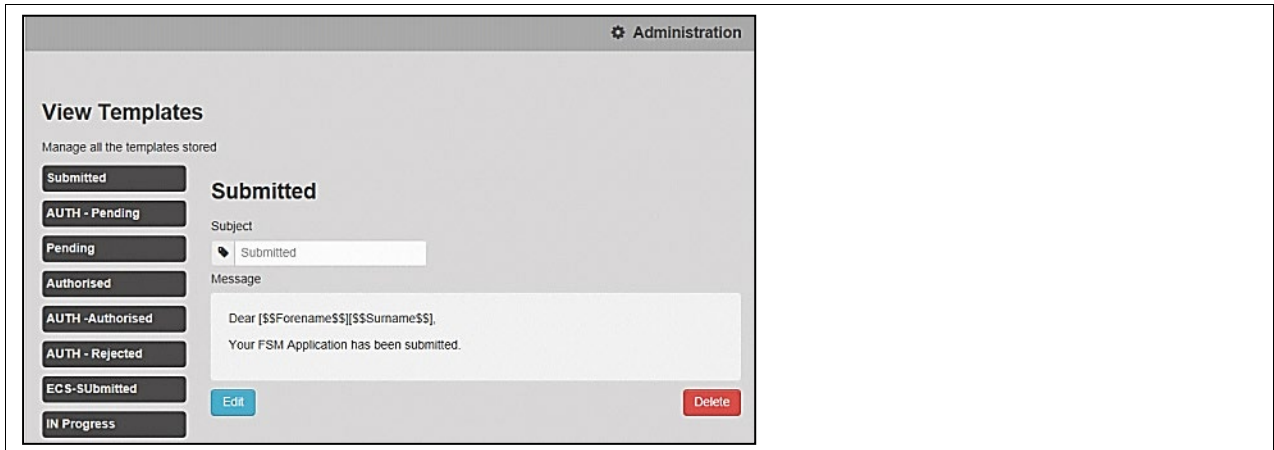
Editing a Template

To edit an existing template:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Template Management | View Templates**.

2. Select the required template then click the **Edit** button to display the **Edit Template** dialog.
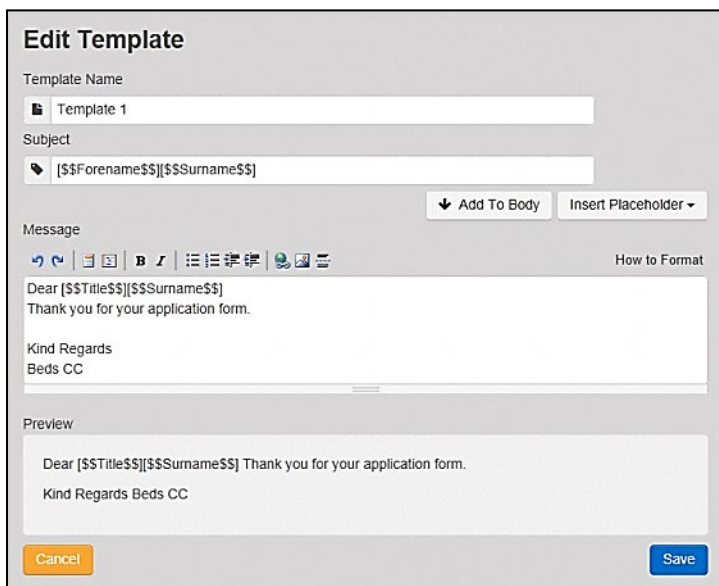
3. Edit the required fields; all of the fields on the **Edit Template** dialog can be edited.

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.
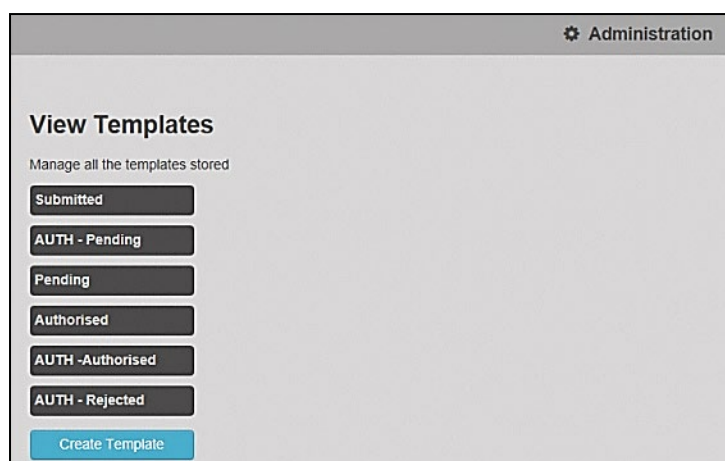
2. Click the template name to display the **Subject** and **Message** that are to be used in the message.
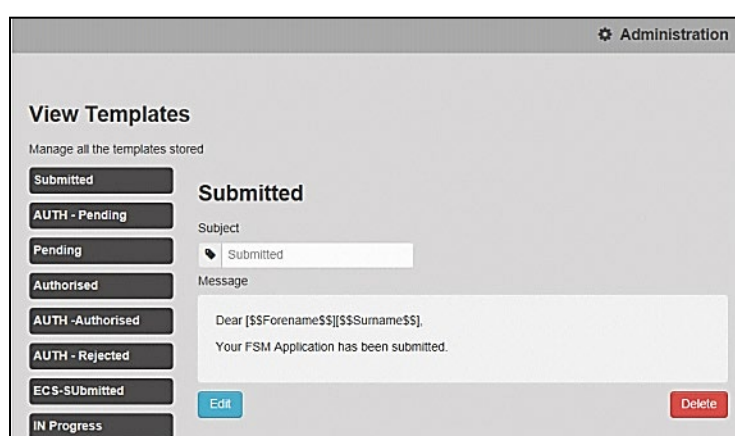
3. Click the **Delete** button to remove the stored template; you must confirm the deletion.

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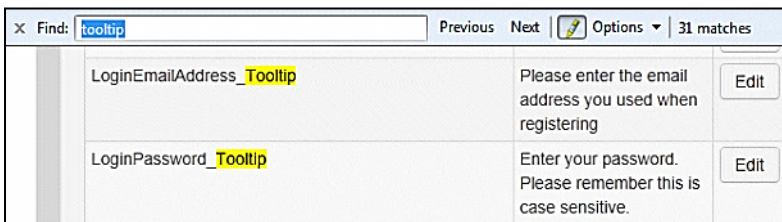
NOTE: *You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.*

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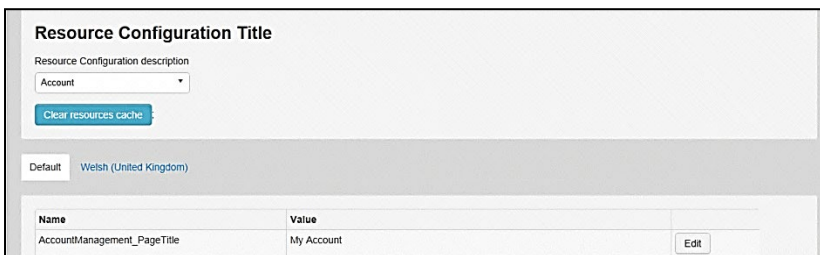
The default option is English (en). Click the **Welsh (United Kingdom)** button to display the Welsh (cy) descriptions.

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

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

The following fields are read-only:

- **Resource Type** – the name of the resource configuration title.

- **Resource Key** – the resource database name.

- **Resource Culture** – en (English) or cy (Welsh)

4. Enter your text in the **Resource Value** field.

5. Click the **Save** button to return to the **Resource Configuration Title** page to continue editing the resource descriptions.

Site Logo and Header text

Portal administrators can now configure the site logo and header text in this area so that they do not get overwritten during upgrades.

To edit the resource descriptions:

1. Select **Administration** from the **Resource Configuration Description** drop-down.

2. Select **CitizenPortal_HeaderText** and click the **Edit** button to display the **Edit Resource Title** dialog. Enter a **Resource Value** as required, eg: Citizen Portal.

Name	Value	
CitizenPortal_HeaderText	Citizen Portal	Edit

3. Click the **Save** button to return to the **Resource Configuration Title** page.

4. Select **CitizenPortal_SiteLogo** and click the **Edit** button to display the **Edit Resource Title** dialog. Enter a description of the logo in the **Resource Value** field, eg: Site Logo.

Name	Value	
CitizenPortal_SiteLogo	Site logo	Edit

5. Click the **Save** button to return to the **Resource Configuration Title** page.

6. Select **CitizenPortal_SiteLogo_URL** and click the **Edit** button to display the **Edit Resource Title** dialog. Enter the URL for the location of the logo, eg: ~/Images/logo_sml.png.

Name	Value	
CitizenPortal_SiteLogo_Url	~/Images/logo_sml.png	Edit

7. Click the **Save** button to return to the **Resource Configuration Title** page.

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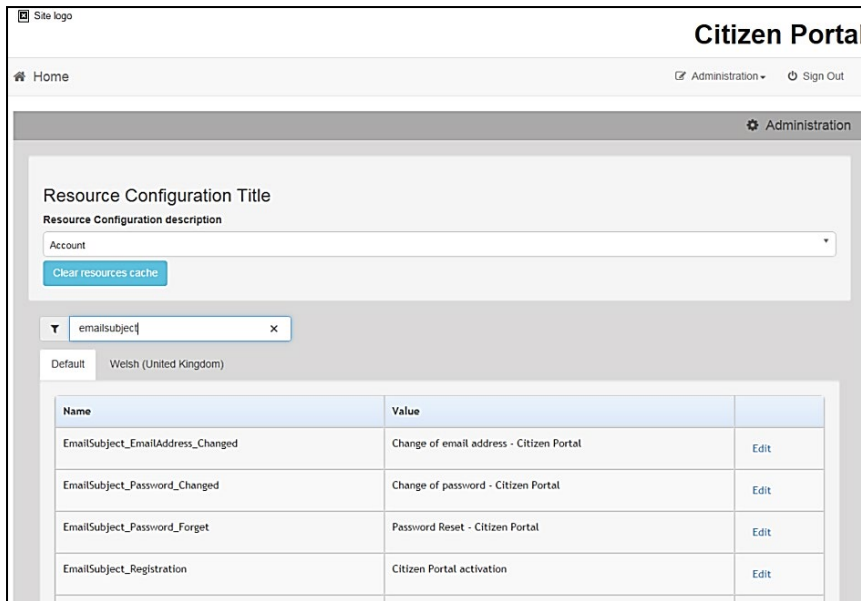
To configure the contents for the different email types, select **Citizen Portal Administration | Administration | Edit Site Texts | Resource Configuration Title | Markdown | Text Blocks**. Default text has been automatically configured for each.

Type *email_* into the **Search** box to filter the list to display the new configurable content items for the different email types.
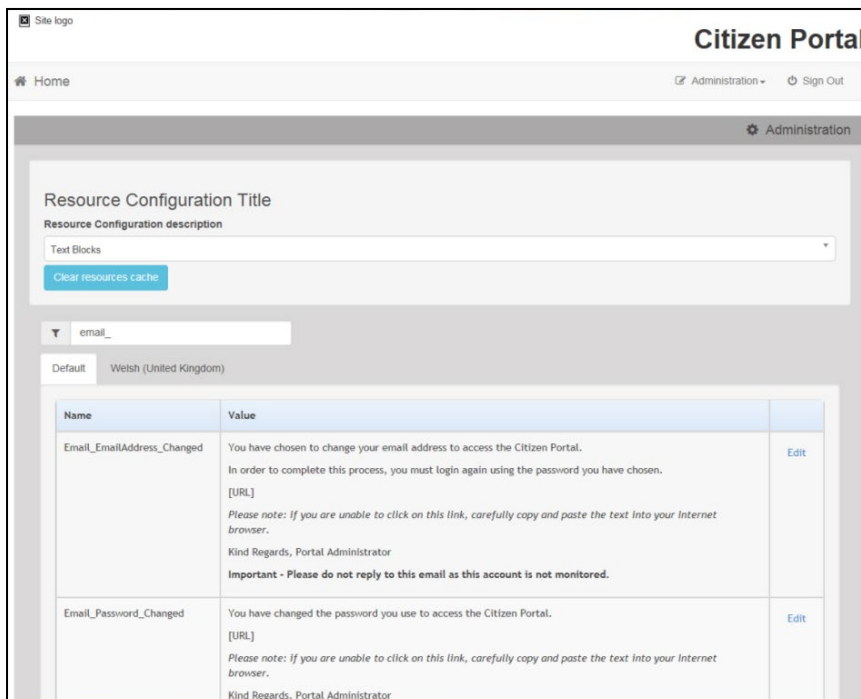
The configurable text block resource names are:

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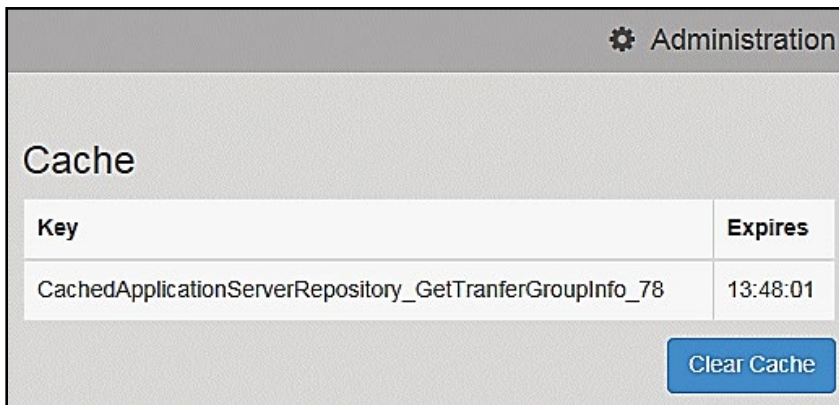
2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.

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.

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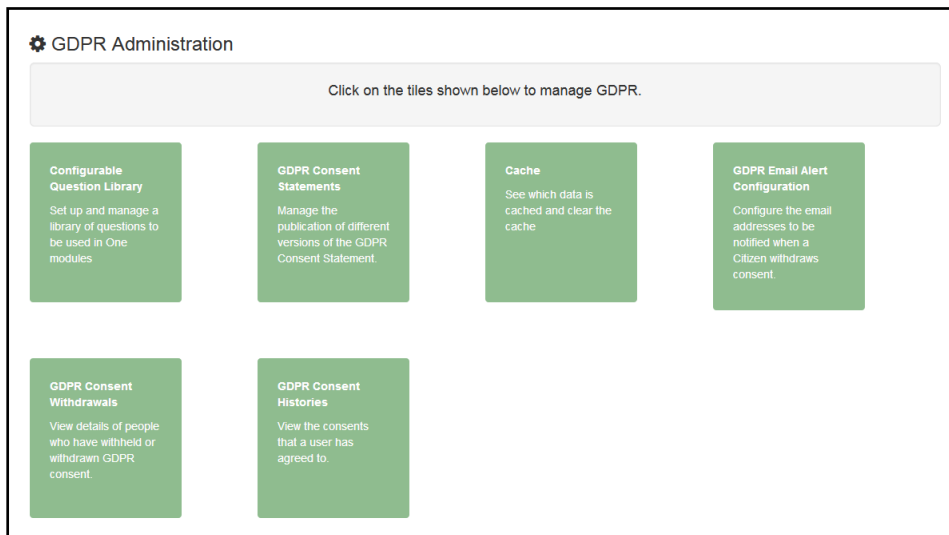
You can only access the **GDPR Administration** area if you have **Read-Write** permission for the **GDPR Administration** business process as shown in the following graphic:

Permissions 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**.
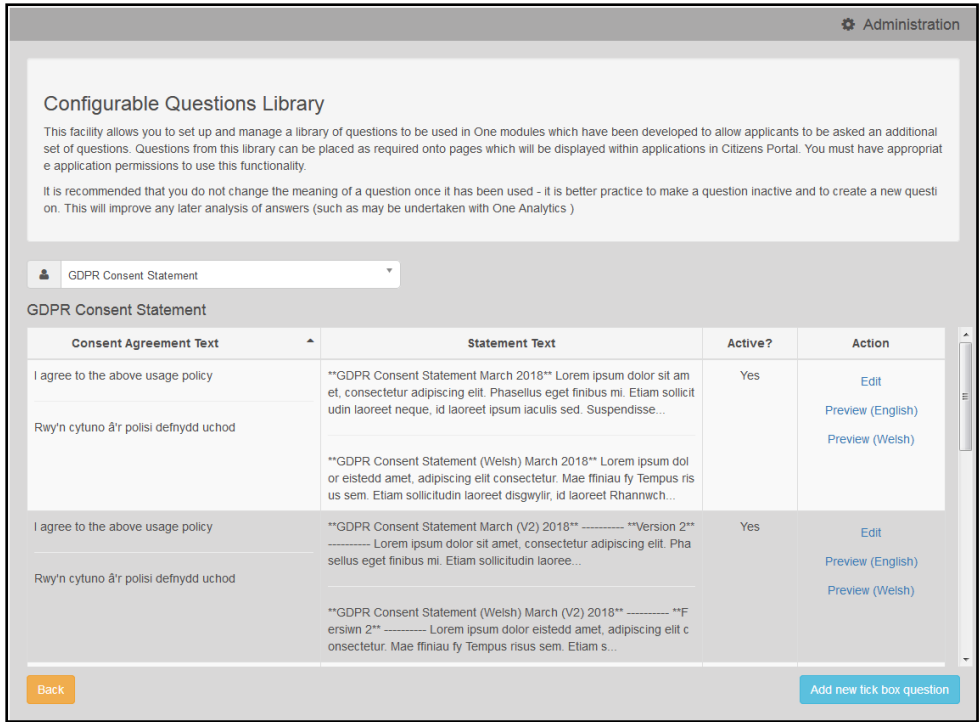
Adding a New Question

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.

2. Ensure that **GDPR Consent Statement** is selected from the drop-down.

3. Click the **Add new tick box question** button to display the **Tick Box Question Editor** window.
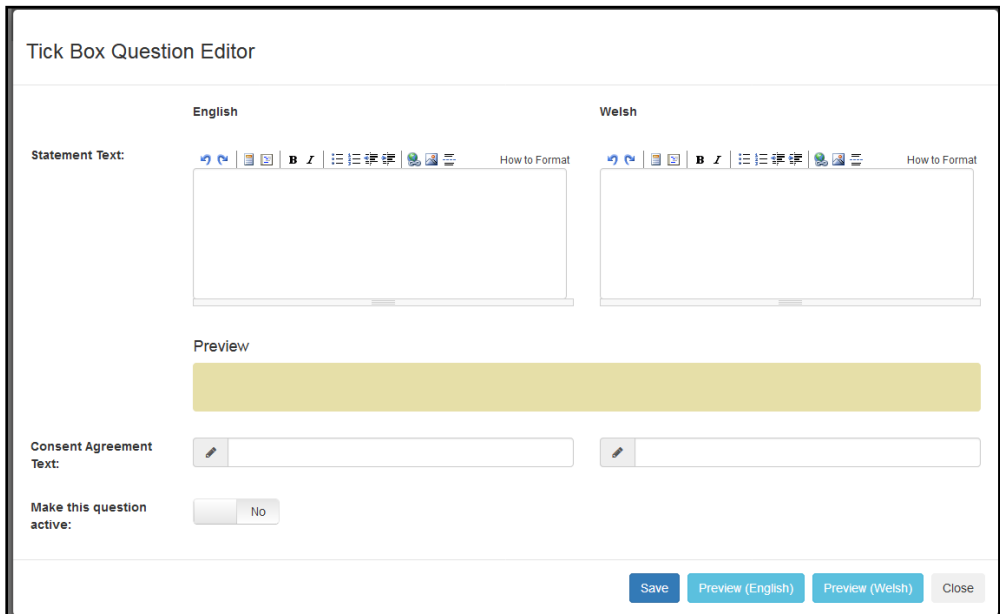
4. Enter the **Statement Text** (in either English or Welsh). This text is presented to the Citizen portal user and comprises the Consent Statement.

5. Enter the **Consent Agreement Text** (in either English or Welsh), This is the question text that is presented to the user with a tick box asking them to agree that their personal data is held in accordance with the contents of the Consent Statement.

6. If required, click the **Make this question active** button.

7. If required, click the **Preview (English)** or **Preview (Welsh)** button.

8. Click the **Save** button.

Publishing a Consent Statement

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

Adding a New Consent Statement

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

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

2. Click the **Add New** button to display a list of consent statements that have been stored in the question library.
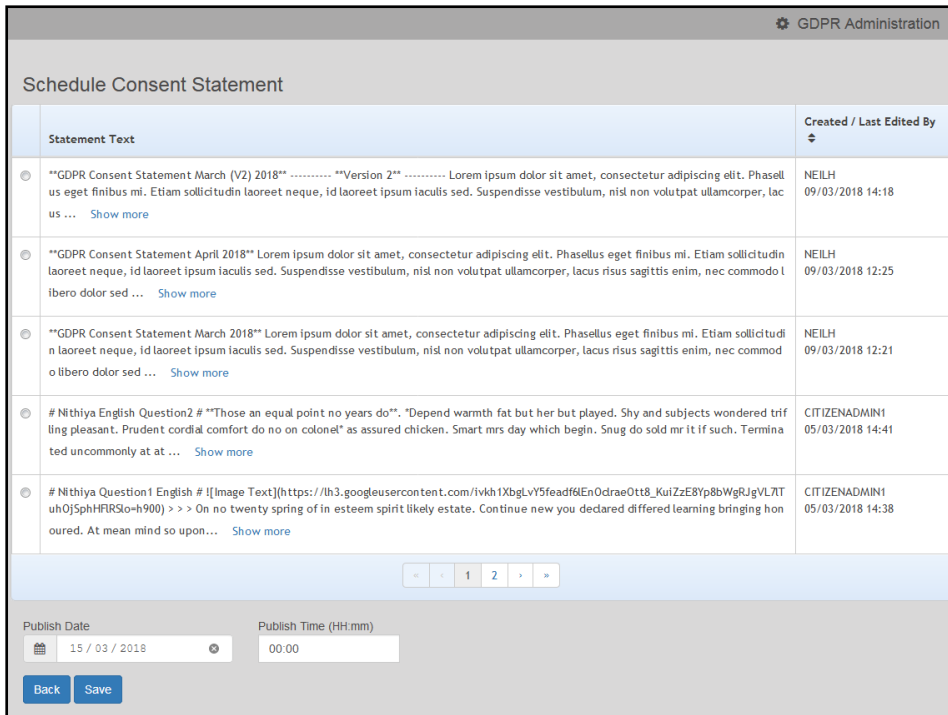
3. Select the radio button adjacent to the required statement and click the **Save** button.

Clearing Cache

To view cached data and clear it:

1. Select **GDPR Administration | Cache** to display the **Cache** page.
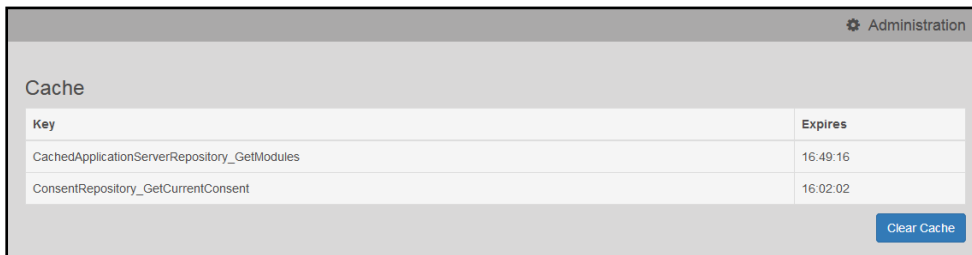
2. If required, click the **Clear Cache** button.

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.

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

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 | Using Thirty Hour Entitlement in the Citizen Portal

Introduction to Using Thirty Hour Entitlement in the Citizen Portal

> **NOTE:** *To use this functionality, the Local Authority must have a licence for Citizen Portal 30 Hours Entitlement.*

Children can be funded for extended hours if they are 3 or 4 years old. Children are entitled to extended hours funding from the start of the term after their third birthday.

The Citizen Thirty Hour Entitlement portal enables parents and carers to check the validity of their extended entitlement code. They can see personalised information such as when the child can start receiving the extended funding. They can choose to share the results of their check with providers and apply for placements.

The parent or carer can view a dashboard showing extended entitlement history for a child.
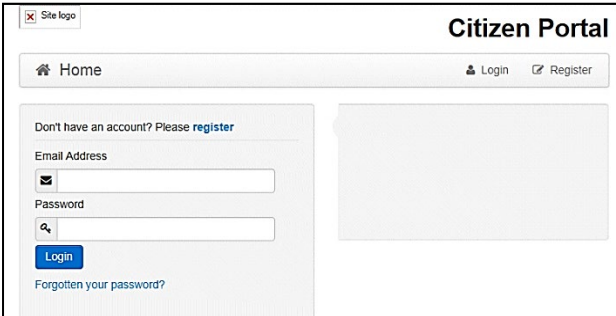
Creating an Account

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. There is an option to display the information in English or Welsh.

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**.

5. To find your address, enter your <u>full</u> 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.

House Number	🏠	100
House Name	🏠	
Building Name	🏠	
Street Name	🏠	▓▓▓▓▓▓ ▓▓
District / Village	🏠	
Town	🏠	▓▓▓▓▓f
County	🏠	
Postcode *	🏠	▓▓▓▓ ▓▓
Country	🌐	Please select ▼

Enter the new address details; **Postcode** is mandatory

7. The **Home Phone**, **Mobile Number** and **Work Phone** are optional.

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

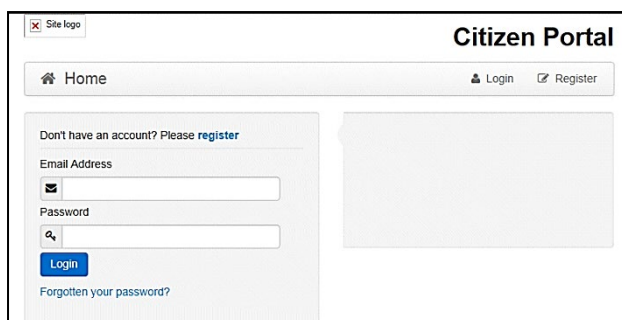|		
Home Phone	📞	
Mobile Number	📱	
Work Phone	📞	
		Submit Registration

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.

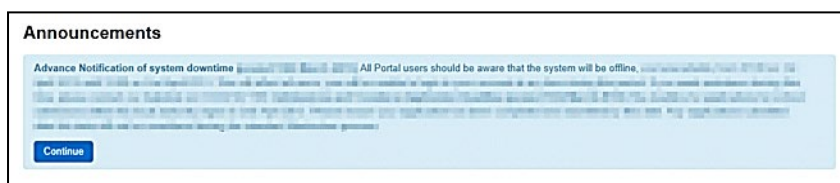# Logging in to the Citizen Portal

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**.

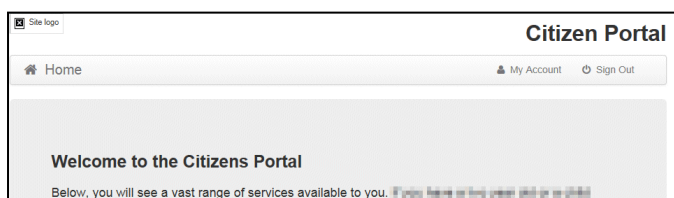4. Click the **Login** button to display the **Announcements** page.

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

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

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

> ***Important Note:*** *It is now possible to enable a second verification step to increase your security. For more information, see My Account.*

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.
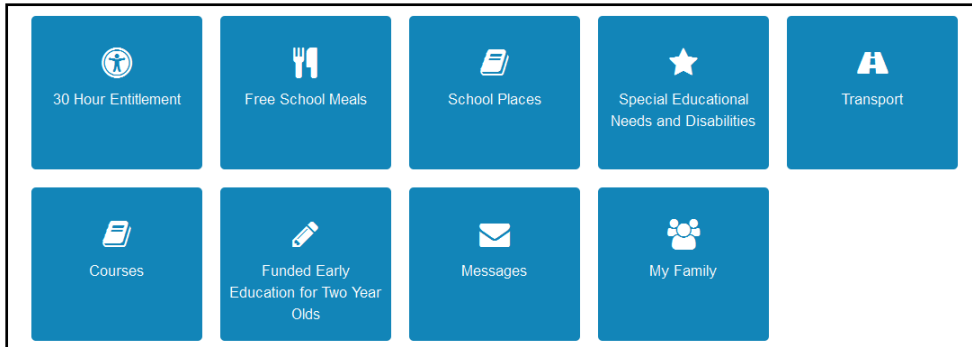
From here, the Citizen portal user can manage their account, check the validity of extended entitlement codes, make applications for school places, free school meals, transport, courses, funded early education for two year olds and complete special educational needs and disabilities forms. They can also 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**
- **Two Step Verification**
- **Consent History**
- **Withdraw Consent.**

For more information, see *My Account* on page *37*.

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.

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**.

4. To edit your address, click **Use Another Address** to display the **Find Address** dialog.

5. Enter your <u>full</u> postcode and click the **Search** button to display a list of addresses for your postcode.

a. 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.

b. 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.
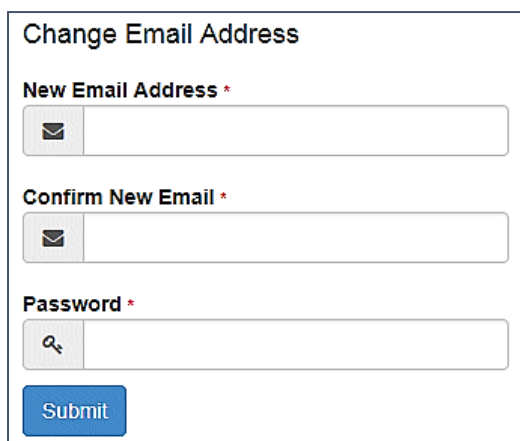
6. Click the **Save** button

Change Email Address

To change your email address:

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 Email Address**.

4. 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 *

🔍

Submit

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 <u>Contact us</u> to open an email.

5. Click the **Back** button to return to the **Home** page.

Two Step Verification

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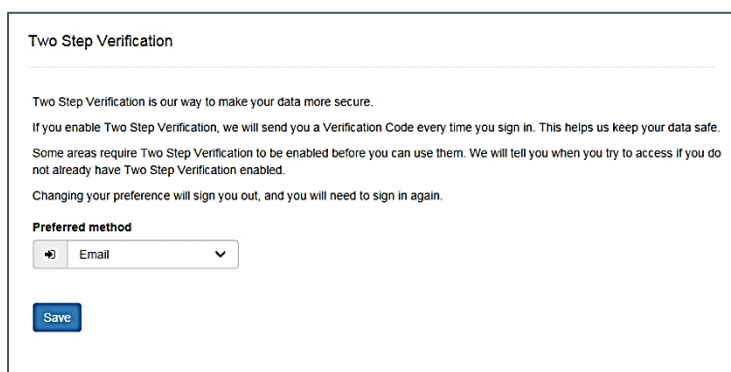
> **NOTE**: *This process is mandatory if you wish to use Special Educational Needs and Disabilities (SEND).*

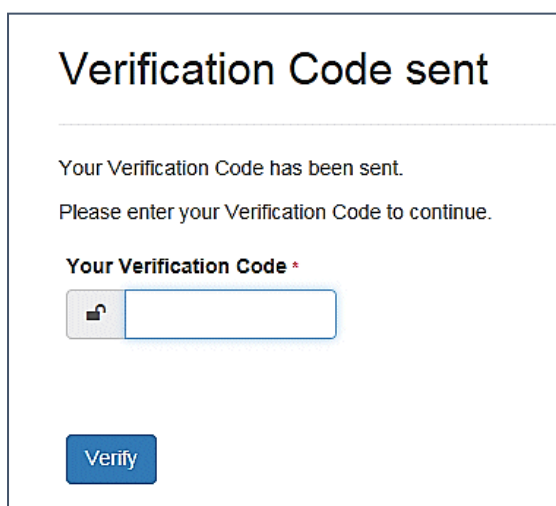## Enabling Two Step Verification

To set up two step verification:

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account at the top of the page.**

3. **Select Two Step Verification**.

Two Step Verification

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

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

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

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

Preferred method

Email

Save

4. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.

5. Click the **Save** button.

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

6. Log in; this time when you log in, the following dialog is displayed:

Verification Code sent

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

Your Verification Code *

Verify

7. Locate the email containing your verification code.

8. Copy and paste your verification code into the box.

9. Click the **Verify** button.

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

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

Disabling Two Step Verification

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

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

To disable two step verification:

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

Two Step Verification

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

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

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

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

Preferred method

No Two Step Verification ∨

Save

2. Select **No Two Step Verification** from the **Preferred method** drop-down.

3. Click the **Save** button.

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

Consent History

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

1. Log onto the Citizen Portal using the email address and password you used to register.

2. Select **My Account** at the top of the page.

3. Select **Consent History** to display the **Consent History** page.

Consent History

Your agreement(s) for the Local Authority to use your information in compliance with current data protection regulations.

Local Authority Consent Statement	You consented on:

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.
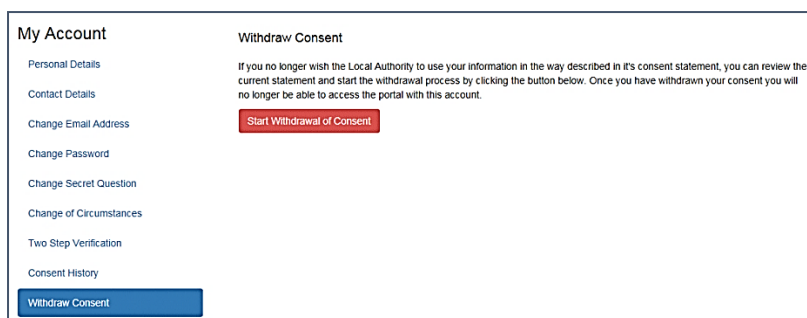
4. Click the **Start Withdrawal of Consent** button to display the **Data Protection** dialog.

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.

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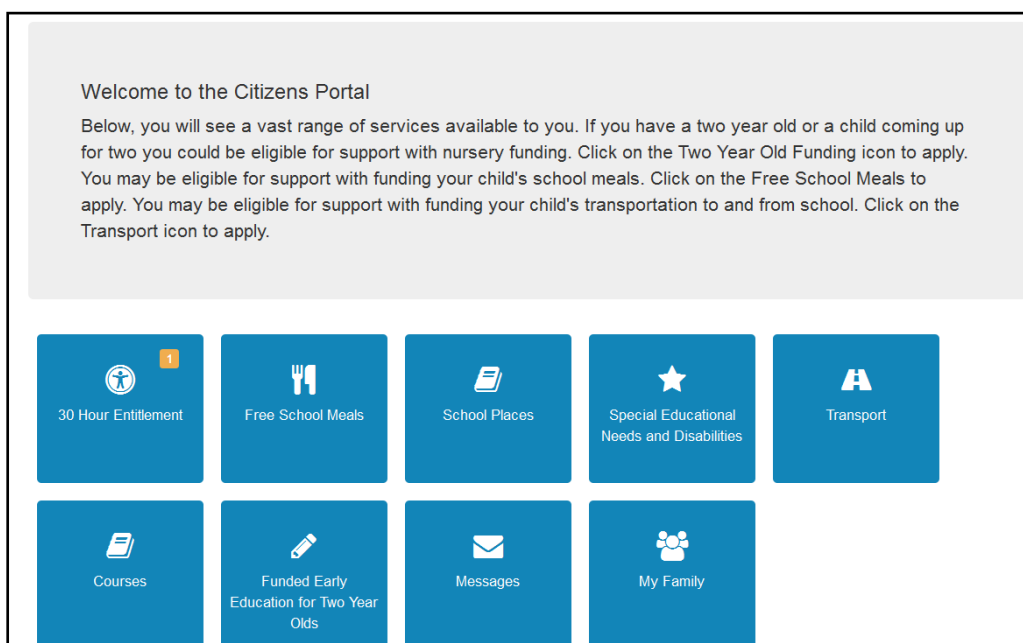
All the following screens can be edited by the local authority via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources**. For more information, see the *Edit Resources* section in the *General Administration* chapter.

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

Retrieving Extended Entitlement Details

Parents, carers and guardians can use the Citizen portal to retrieve the validity details for the extended entitlement code that they have received from HMRC.

Colour coding is used on the 30 Hour Entitlement tile to display the number of children whose parents/carers need to reconfirm eligibility with HMRC. The number displayed in red indicates the number of children whose eligibility has expired. The number displayed in amber is the number whose parents need to reconfirm their eligibility codes with HMRC.

To retrieve the extended entitlement details, the parent or carer completes the following process:

1. Click the **30 Hour Entitlement** tile to display the **Welcome** page showing the details of any children who are in the correct age group for 30 hours funding.
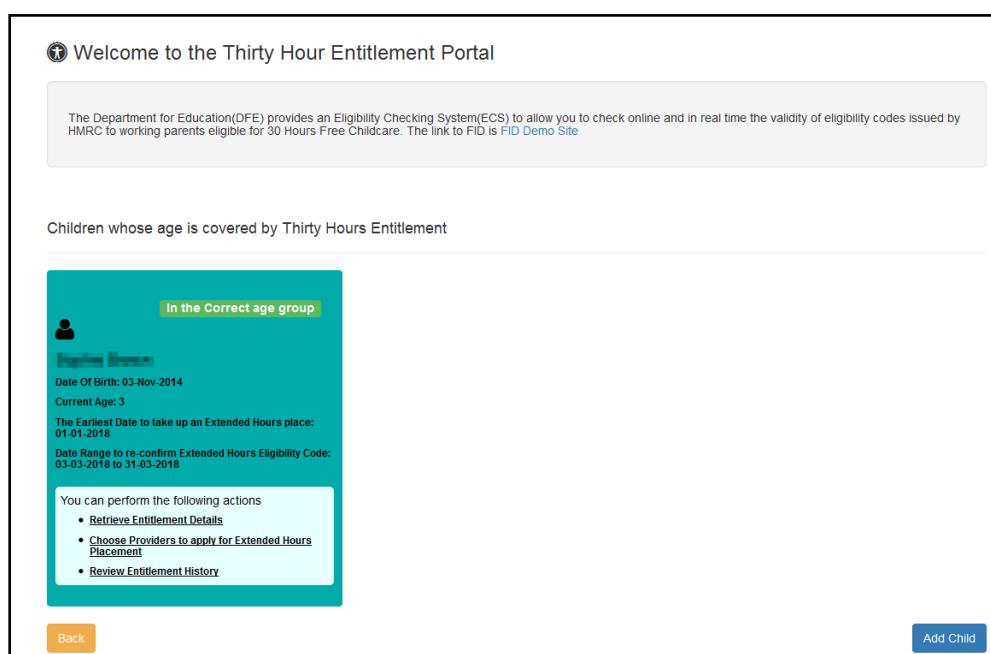
NOTES: The **Date Range to re-confirm Extended Hours Eligibility Code** *starts at the validity end date minus 28 days and ends on the validity end date.*

A highlighted message is displayed on child's tile using the following colours:

Green – parents/carers are not yet in the period in which they need to reconfirm eligibility with HMRC.

Amber – parents/carers need to reconfirm their child's eligibility by visiting the HMRC website. To avoid a break in eligibility, this must be done before the validity end date displayed.

*Red – if the parent/carer has reconfirmed their child's eligibility with HMRC they can update their details by clicking the **Retrieve Entitlement Details** link. If they have not reconfirmed eligibility, there may be a break in entitlement.*

2. If required, click the **Add Child** button to add details of a different child. For more information, see .

3. Click the **Retrieve Entitlement Details** link to display the **Retrieve Entitlement Dates for Extended Hours** page.

4. Click the **Retrieve Entitlement Dates** button to perform a check with the DWP and display the check results.

5. If required, click the **HMRC Childcare Account** link to sign in to your HMRC childcare account and reconfirm eligibility for extended hours funding.

Adding a New Child

The parent or carer can add details of a new child.

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 <u>full</u> **Postcode** and click **Search** to display the list of addresses matching your postcode.

   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.

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.

   *NOTE: The tile for the newly added child only displays the **Retrieve Entitlement Details** link.*

1. To retrieve eligibility details, click the **Retrieve Entitlement Details** button to display the **Retrieve Dates for Extended Hours** page.

2. Enter **Parent's NI Number** and **Eligibility Code**.

3. Click the **Retrieve Entitlement Dates** button to perform a check with the DWP and display the check results.

Sharing Entitlement Details with Providers

After retrieving entitlement details, parents and carers can choose to share the detailed results with selected providers. To apply for a placement, click the **Choose Providers to share Entitlement Details** button to display the provider selector page.

The Provider Share screen now includes new filters and additional field which allows for more information to be displayed.

*Note: the block of text shown on screen can be removed by the local authority via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources**. For more information, see the Edit Resources section in the General Administration chapter.*

The new functionality in using this screen will allow you to search for and see which providers offer funded extended hours (30 hours). All providers will be shown but only those offering funding for extended hours can be selected.

You can narrow down the list of providers by ticking to filter based on one or a combination of, the provider name, the type of provider (e.g. childminders) and from a postcode. When you tick to filter by postcode, the postcode shown will be your own postcode, but you can change this if required. A **Distance (Miles)** from Postcode box will also be shown, this will default to 5 miles initially but can be changed. This allows you to see providers that are 5 miles from that postcode. Once you have entered in the criteria you want to search on please click the Search button.

Once you have found the provider you wish to share your entitlement details with then click on the Share button. You can share your details with more than one provider.

Please be aware that by sharing your details with the provider doesn't guarantee you a place, the provider will make contact to establish if they are able to accommodate your requirements and agree the next steps.

> **NOTE:** *To be available for selection, a provider must have at least one service with the **Offers Extended Childcare** check box selected in the v4 Client.*

The Providers that are currently chosen by the parent/carer to share entitlement details are displayed at the bottom of the screen.

1. To share entitlement details with a new provider:

   a. Select and enter the relevant information in the fields of your choice. Click the **Search** button.

   b. Select the required provider. Only providers that offer extended childcare can be selected
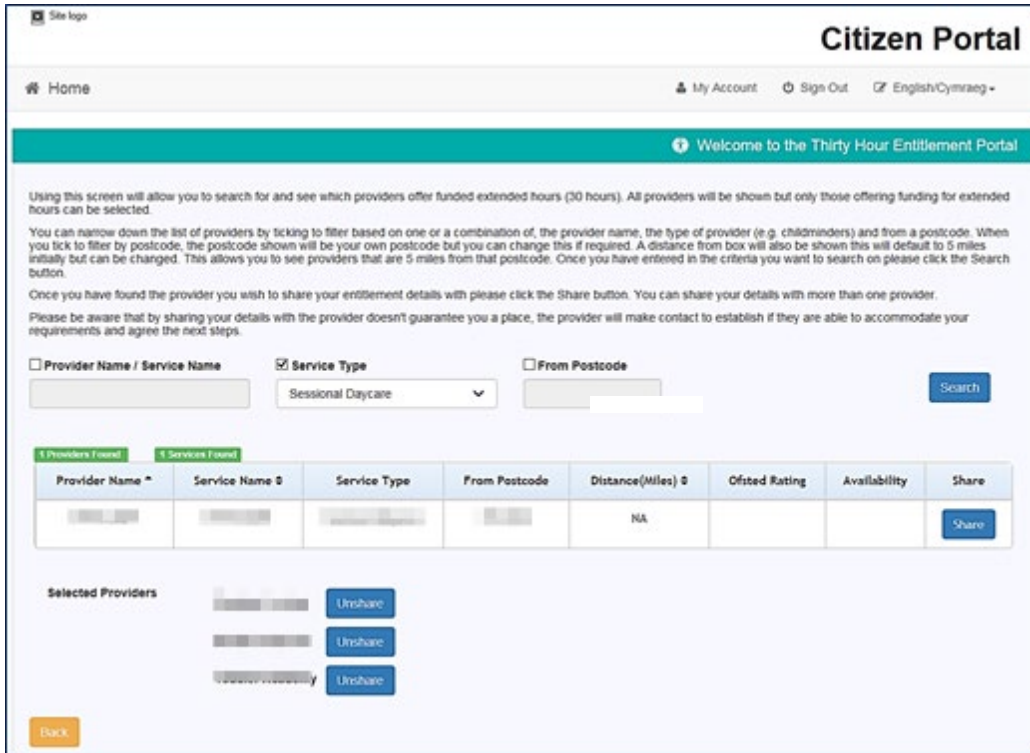
2. If required, click the **Unshare** button to stop sharing details with this provider.

> **NOTE:** *If the provider name is highlighted in green, the child is already attending or is going to attend this provider and the parent or carer cannot unshare the extended entitlement details.*
>
> *If a provider name is highlighted in red, the provider has rejected a placement application for this child. The parent or carer can unshare the details with them.*
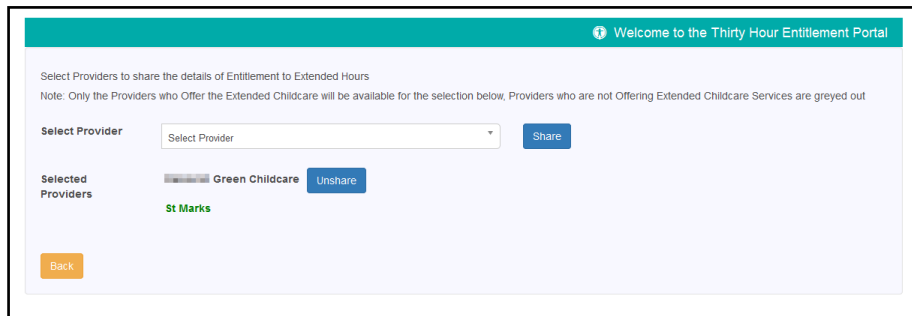
Reviewing Entitlement History

Parents and carers can view a history of extended entitlement dates for their child.

1. Click the **30 Hour Entitlement** tile to display the **Welcome** page.

2. Click the **Review Entitlement History** link to display the **Entitlement History** page.

3. If required, filter the list by entering a keyword.

4. If required, click a column heading to sort the list.

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