



Doc Ref

Early Years - Two Year Old Funding Citizen Portal Handbook/Spring 2020 (3.71)/28-02-2020

Copyright © 2020 Capita Business Services Limited All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated or transmitted without the express written consent of the publisher. Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

www.capita-one.co.uk

Contact Capita Software Support

You can log a call at https://support.capitasoftware.com/

Providing Feedback on Documentation

We always welcome comments and feedback on our all documentation. If you have any comments, feedback or suggestions please email:

onepublications@capita.com

Contents

01	Document Change Control	1
02	Citizen Self Service Admin	5
•	Overview	
	Using this Handbook	6
03	Managing Users	7
•	Citizen Self Service Portal Administrator	7
	Logging in to One v4 Online	7
	Changing a Password	8
	Forgotten Password	8
	Logging in to Citizen Portal Admin	10
	The Citizen Portal Home Page	11
	Home Administration Page	11
	Home GDPR Administration Page	12
	Home Local Authority Page	12
	User Management (Local Authority)	
	Viewing User Details	13
	Changing a User's email Address	13
	Resetting a User's Password	13
04	General Administration	.15
•	Introduction to General Administration	
	Portal Configuration	16
	Configuring the Site Settings	16
	Configuring Password Settings	16
	Configuring ECS Settings	17
	Configuring Application Settings	18
	Configuring User Defined Fields (UDFs)	20
	Configuring UDFs for Two Year Old Funding	20
	Configuring Message Settings	20
	Configuring Application Type Settings	21
	Configuring Scheduled Task Settings	22
	Template Management	22
	Creating a Template	23
	Viewing Templates	24
	Editing a Template	25
	Deleting a Template	26
	Edit Resources	26
	Editing Resource Descriptions	27
	Configuring Automatic Emails	29
	Cache	31

05	GDPR Administration	33
	Introduction to GDPR Administration	33
	Setting Up Questions	33
	Adding a New Question	34
	Publishing a Consent Statement	35
	Adding a New Consent Statement	35
	Clearing Cache	36
	Configuring Email Alerts	36
	Viewing Consent Withdrawals	37
	Viewing Consent History	38
<i>0</i> 6	Two Year Old Funding Administration	39
	Introduction to Two Year Old Funding Administration	39
	Interpreting the Qualifier Codes	39
	Creating a Dummy Base (2YOF)	40
<i>0</i> 7	Making Applications	43
	Introduction to Making Applications	43
	Creating an Account	44
	Logging in to the Citizen Portal	46
	GDPR Update	47
	Update Data Protection Consent Statement	47
	Two Step Verification	47
	Home Page	49
	My Account	50
	Personal Details	50
	Contact Details	51
	Change Email Address	52
	Change Password	53
	Change of Circumstances	53
	Two Step Verification	53
	Consent History	55
	Withdraw Consent	55
	My Family	56
	Adding a Child	57
	Making Applications For Two Year Old Funding	58
	Making an Economic Application	
	Requesting Help	62
	Making a Non-Economic Application	
	Messages	64
	Responding to Requests	64
Ind	lex	68

01 Document Change Control

Date	Release	Description	
Spring	3.71	Site Logo and Header text	
2020		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 27.	
		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.	

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 full postcode must be used to search for an address. • Only addresses matching the full 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 must use the Search button and not 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 44. See Contact Details on page 57.	
Summer 2019	3.69		

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 "lan" and "lan ". This will prevent conflicts when matching data.
Spring	3.68	Carer Date of Birth
2019		A validation check has been introduced to prevent a Carer from being added that is under 16 e.g. too young to have a National Insurance Number.
See <u>Making ar</u>		See <u>Making an Economic Application</u> on page 60.
		Update to Data Protection Consent Statement
		If an LA updates its Data Protection Consent Statement, an additional dialog is displayed when logging on to the Citizen Portal.
		For more information, see <u>GDPR Update</u> on page <i>4</i> 7.

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:

- Administration
 - General Administration
 - Portal Configuration
 - Template Management
 - Configurable Question Library
 - Edit Resources
 - Cache
- GDPR Administration
 - Configurable Question Library
 - GDPR Consent Statements
 - Cache
 - GDPR Email Alert Configuration
 - GDPR Consent Withdrawals
 - GDPR Consent Histories
- Local Authority
 - View All Applications
 - User Management.

At the end of this handbook, there is a section explaining how the parent, carer or guardian makes an application. For more information, see <u>Introduction to Making Applications</u> on page 43.

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.

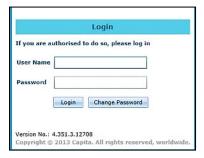
More Information:

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

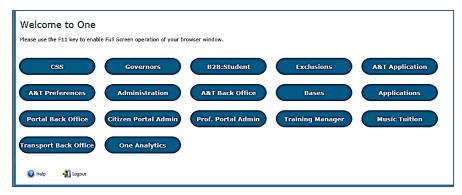
To log in to One v4 Online, you need to obtain a licence key for the required v4 Online module from Capita. You must also be set up as a user in One v4 Client.

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



- 2. Enter your **User Name**; this is the same as your v4 Client user name.
- 3. Enter your **Password**; this is the same as your v3 password. Passwords are case sensitive. To change your password, see Changing a Password on page 8.
- 4. Click the **Login** button to display the **Welcome to One** page.

Managing Users



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

More Information:

RG_Online_Administration_Login_Logout available from the One Publications website.

Changing a Password

To change your password in v4 Online:



 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:

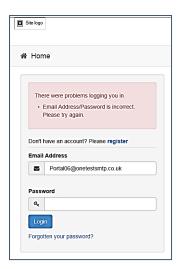
RG_Online_Administration_Login_Logout available from the One Publications website.

Forgotten Password

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

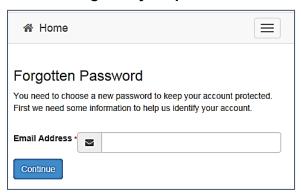
Check that you have entered the correct email address.

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.
- 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 <u>email address</u>, be set up as a <u>user</u> and belong to a <u>user group</u> in <u>One v4</u>. 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 7.



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 <u>Home | Administration Page</u> section on page 11.
- **GDPR Administration** for more information, see the <u>Home | GDPR Administration Page</u> section on page 12.
- Local Authority for more information, see the <u>Home | Local Authority Page</u> 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.



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 | GDPR Administration Page

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

The GDPR Administration tile is only available if permissions have been granted.

The **GDPR Administration** page enables the following administration processes to be carried out:

- Configurable Question Library
- GDPR Consent Statements
- Cache
- GDPR Email Alert Configuration
- GDPR Consent Withdrawals
- GDPR Consent Histories

Home | Local Authority Page

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

From here the administrator can manage applications and users.

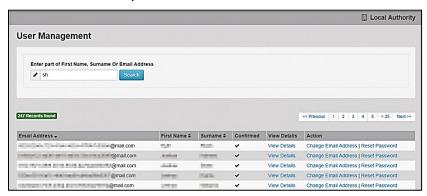
Clicking the **View All Applications** button displays the **Applications** browse list. For more information, refer to the following handbooks:

Two Year Old Funding Administration Handbook – the section on Introduction to Two Year Old Funding Applications.

Clicking the **User Management** button displays the **User Management** page. For more information, see <u>User Management</u> (<u>Local Authority</u>) 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 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

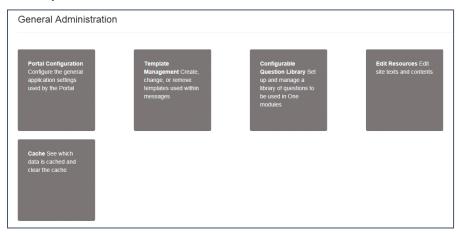
To reset a user's password:

- 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.
- 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

Introduction to General Administration

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



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

- Portal Configuration configure the general application settings used by the portal. For more information, see the following sections:
 - Portal Configuration on page 16.
 - Configuring the Site Settings on page 16.
 - Configuring Password Settings on page 16.
 - Configuring ECS Settings on page 17.
 - Configuring Application Settings on page 18.
 - Configuring Message Settings on page 20.
 - Configuring Application Type Settings on page 21.
 - Configuring Scheduled Task Settings on page 22.
- **Template Management** create, change or remove templates used within the messages. For more information, see the following sections:
 - Template Management on page 22.
 - <u>Creating a Template</u> on page 23.
 - Viewing Templates on page 24.
 - Editing a Template on page 25.
 - <u>Deleting a Template</u> on page 26.
- Configurable Question Library set up and manage a library of questions to be used in the One A&T module.

- Edit Resources edit site texts and contents. For more information, see the following sections:
 - <u>Edit Resources</u> on page 26.
 - <u>Editing Resource Descriptions</u> on page 27.
- Cache see which data is cached and clear the cache. For more information, see the following section:

Cache on page 31.

Portal Configuration

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

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

More Information:

Configuring the Site Settings on page 1.

Technical Guide - Deploying and Configuring the One Citizen Self Service Portal for Local Authorities, available on the **One Publications** website.

Configuring the Site Settings

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

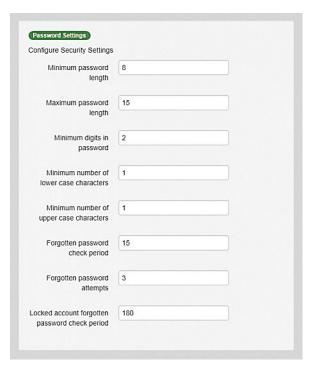
- Password Settings
- ECS Settings (Eligibility Checking Service)
- Application Settings
- Message Settings
- Application Type Settings
- Scheduled Task Settings

Configuring Password Settings

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

To configure the password security settings:

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



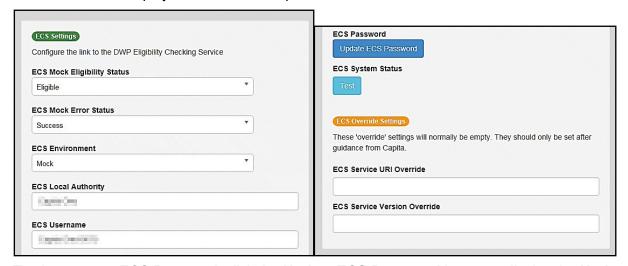
3. Click the Save button.

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.
- Confirm the new password.

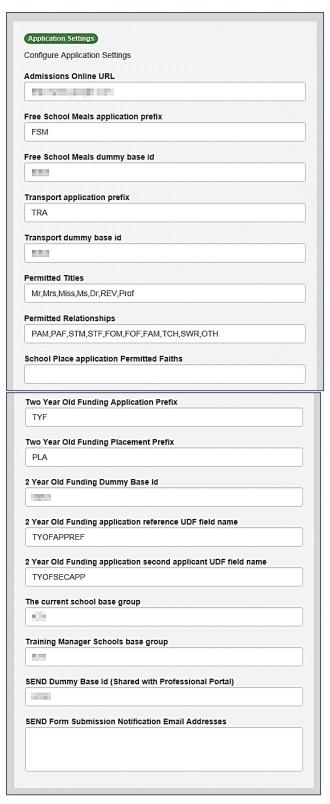
- 6. To view the ECS System Status, click the **Test** button. An information message is displayed from the webpage.
- Enter the following URL into the ECS Service URI Override field: https://ecs.education.gov.uk/fsm.lawebservice/20170701/OnlineQueryService.svc
- 8. Enter information into **ECS Service 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).

Configuring Application Settings

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

To configure the application settings:

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



3. Click the Save button.

Configuring User Defined Fields (UDFs)

UDFs enable you to add extra fields to accommodate data items that One does not store. UDFs are created against entities, for example Student Details.

UDFs are set up in the v4 Client via Tools | Administration | UDF Management.

More Information:

RG Administration UDFs available on the One Publications website.

Configuring UDFs for Two Year Old Funding

The following UDFs need to be created for Two Year Old Funding:

- Application Reference Number
- Second Applicant Details
- Placement Reference Number.

More Information:

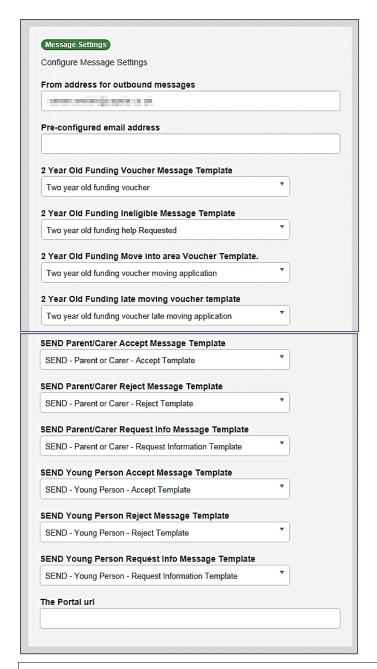
Creating Two Year Old Funding UDFs section of the Setting Up Two Year Old Funding for Local Authorities technical guide available on the One Publications website.

Configuring Message Settings

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

To configure the message settings:

- 2. On the **Message Settings** panel, enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.



IMPORTANT NOTE: For users of the SEND Portal, **The Portal URL** field must be populated by the LA (e.g. http://www.capita-one.co.uk) to enable the citizen to view any portal messages. If this field is not populated, then when a citizen selects the hyperlink from within a message, an error message is displayed.

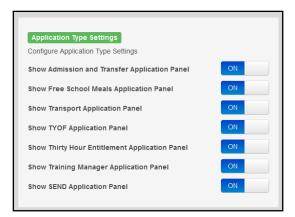
3. Click the Save button.

Configuring Application Type Settings

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

To configure the application type settings:

- 2. On the **Application Type Settings** panel toggle the panels **ON** or **OFF** as required. Click in a field to display the relevant tooltip.



3. Click the Save button.

Configuring Scheduled Task Settings

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

To configure the scheduled task settings:

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



3. Click the Save button.

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

Template Management

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

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

- Title
- Forename

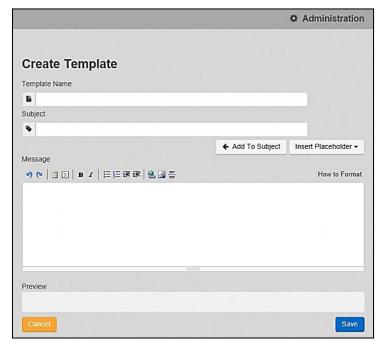
- Surname
- Business Phone
- Mobile Phone
- Home Phone.

The placeholders are edited via Administration General Administration Edit Resources Resource Configuration Title Administration.		
Title	Placeholder_Title	
Forename	Placeholder_Forename	
Surname	Placeholder_Surname	
Business Phone	Placeholder_BusPhone	
Mobile Phone	Placeholder_Mobile	
Home Phone	Placeholder_HomePhone	

Creating a Template

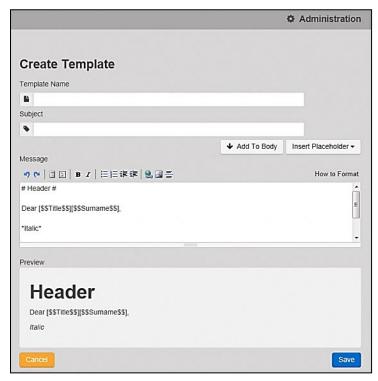
To create a new template:

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



- 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.
- 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.

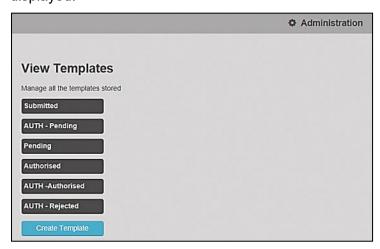


8. Click the **Save** button to close the page and return to the **View Templates** page.

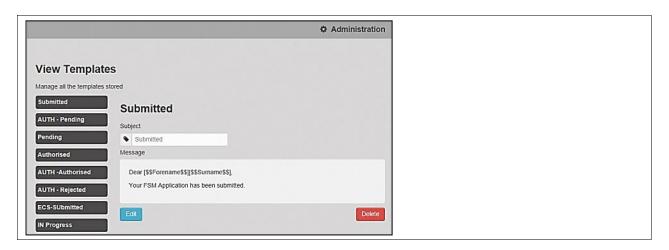
Viewing Templates

To view an existing template:

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



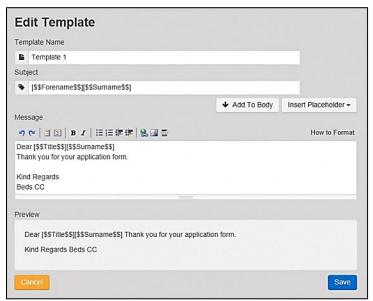
Click the template name to display the Subject and Message that are to be used in the message.



Editing a Template

To edit an existing template:

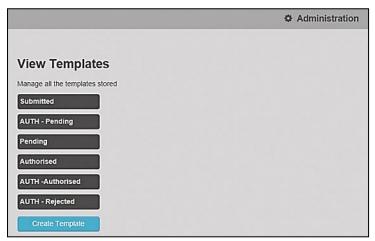
- 1. Select One v4 Online | Citizen Portal Admin | Administration | General Administration | Template Management | View Templates.
- 2. Select the required template then click the **Edit** button to display the **Edit Template** dialog.



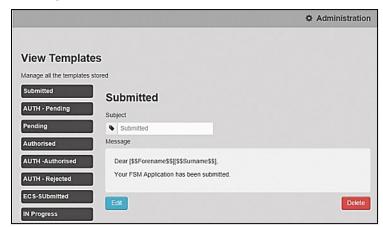
- 3. Edit the required fields; all of the fields on the **Edit Template** dialog can be edited.
- 4. Click the Save button.

Deleting a Template

To delete an existing template:



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.



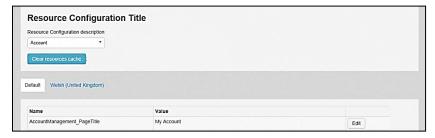
NOTE: You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.

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:

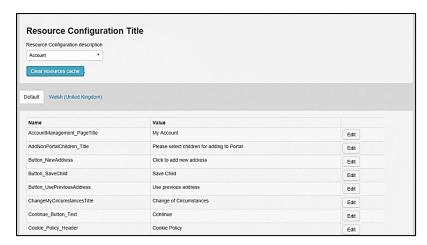
1. Select Administration | General Administration | Edit Resources to display the Resource Configuration Title page.



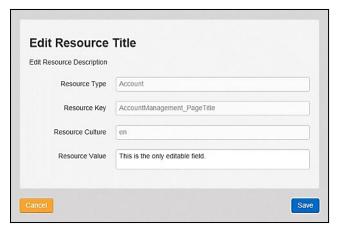
The default option is English (en). Click the **Welsh (United Kingdom)** button to display the Welsh (cy) descriptions.

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

General Administration



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



The following fields are read-only:

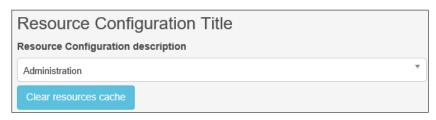
- **Resource Type** the name of the resource configuration title.
- **Resource Key** the resource database name.
- **Resource Culture** en (English) or cy (Welsh)
- 4. Enter your text in the Resource Value field.
- 5. Click the **Save** button to return to the **Resource Configuration Title** page to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



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:

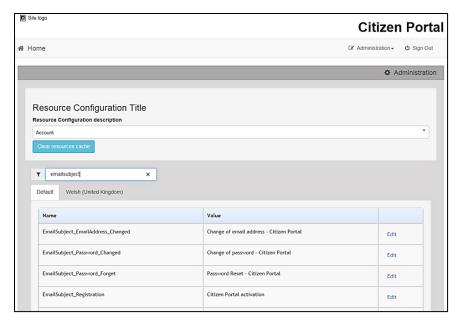
- User indicates that they have forgotten their password
- User changes their password
- User changes their email address
- Administrator resets a user's password (system sends forgotten password email to user).
- Administrator changes a user's email address (system sends a changed email address confirmation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

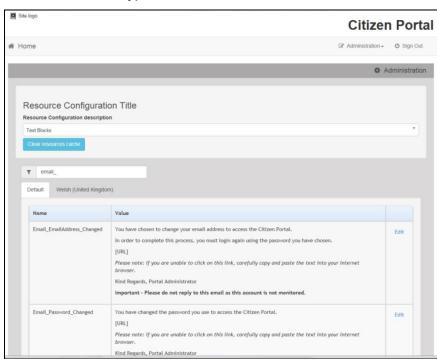
To configure the subject lines for the different email types, type *emailsubject* into the **Search** box to filter the resource list to display the new configurable email subject items.

General Administration



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

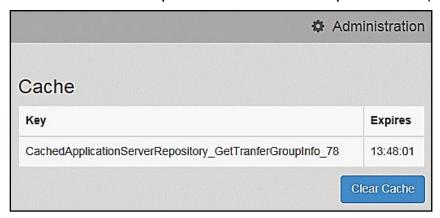
Cache

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.

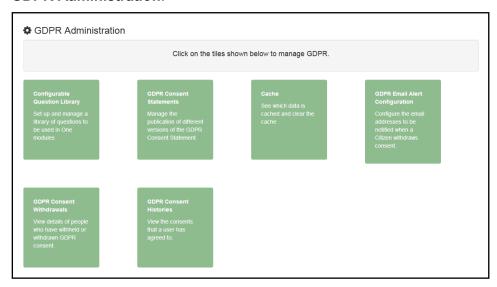


- 2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.
- 3. Click the Save button.

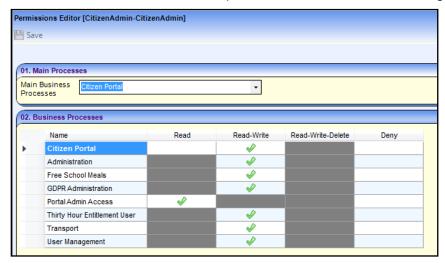
05 GDPR Administration

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:

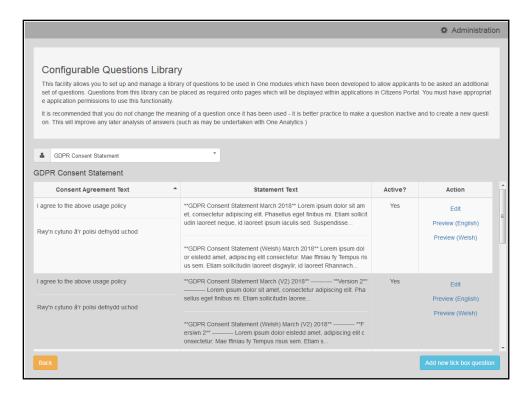


Permissions are set up in the v4 Client via **Tools | Permissions**.

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.

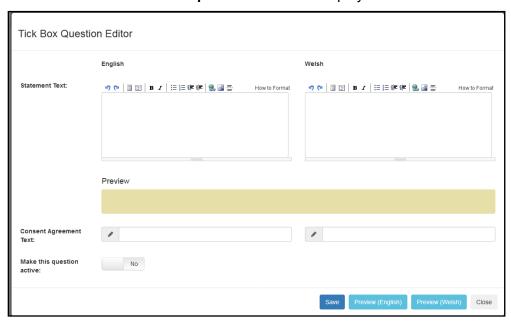
The page is accessed via GDPR Administration | Configurable Question Library.



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.

- 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.

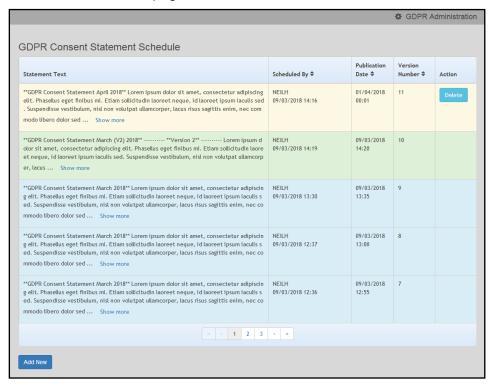
Publishing a Consent Statement

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.

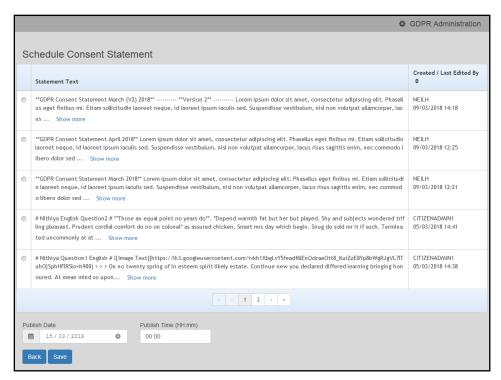
Adding a New Consent Statement

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.



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

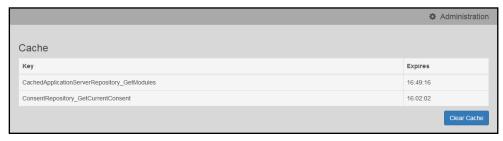


3. Select the radio button adjacent to the required statement and click the **Save** button.

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.

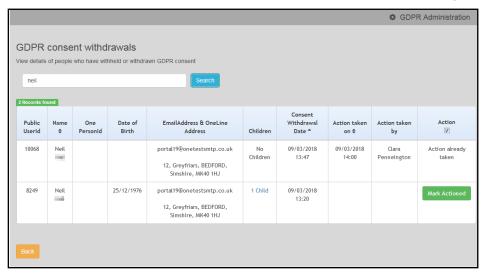


- 2. Enter the required **Notification Email Addresses**, separated with a semi-colon.
- 3. If required, click the **Send Test Email** button to send a test email to each address.
- 4. Click the Save button.

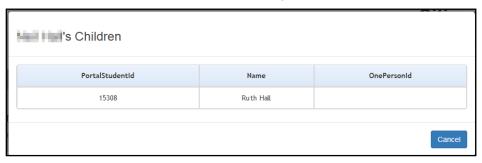
Viewing Consent Withdrawals

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:

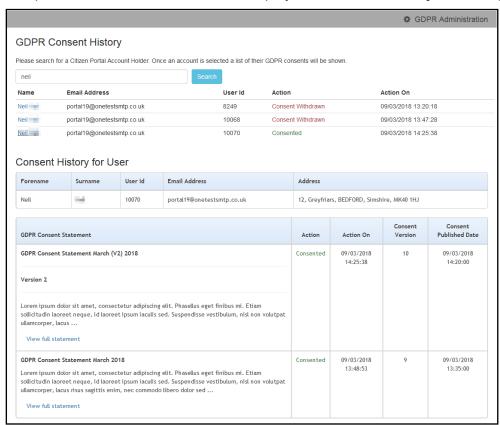
 Select GDPR Administration | GDPR Consent Histories to display the GDPR Consent History page.



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 Two Year Old Funding Administration

Introduction to Two Year Old Funding Administration

Two Year Old Funding administration is managed via the One Provider Portal.

Applications for Two Year Old Funding are made by the applicant via the Citizen Self Service portal, but they are reviewed by the local authority via **Provider Portal | Two Year Old Funding | Manage Applications and Placements | Manage Two Year Old Funding Applications/Placements**. The applications are then imported into the One Early Years module.

Parents, guardians and carers can apply for two year old funding with instant feedback as to their eligibility from the **Eligibility Checking Service (ECS)**. Applications are loaded into the Early Years module for processing and batch checking.

The DfE ECS Endpoint includes qualifiers. A qualifier is an additional piece of information that is available via ECS when a check result comes back as Not Found. These qualifiers are interpreted and displayed to the person carrying out the check. For more information, see Interpreting the Qualifier Codes on page 39.

Two year old funding applications are made via the Citizen Self Service portal, and imported into One. Students and parents (carers and guardians) are matched via the **Portal Back Office** functionality. The applications are then loaded into One.

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

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

For information on how parents, carers and guardians make their two year old funding applications via the Citizen Self Service portal see <u>Making Applications For Two Year Old Funding</u> on page 58.

More Information:

One Two Year Old Funding Provider Portal Handbook available on the One Publications website.

Interpreting the Qualifier Codes

When a check result for Two Year Old Funding comes back with a status of Not Found, a qualifier is also returned.

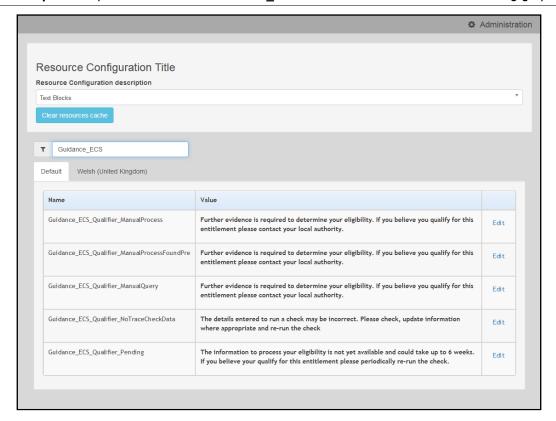
The qualifier is interpreted and presented to the person carrying out the check:

- In the messages displayed whenever an ECS check is performed.
- In templates for system messages generated when an ECS check is performed.
- To administrators as part of the request help process following an unsuccessful ECS check.

The following table shows how the qualifier is interpreted:

Qualifier	Interpretation	
Final	The check result stands and no further action is required.	
Pending	The information to process the check is not yet available and could take up to 6 weeks. The check should be periodically re-run.	
No Trace	Details entered may be incorrect. The parent should re-enter their details.	
Manual Process	The parent should provide further evidence and the LA should raise a manual query on the ECS web portal.	
Manual Query	Taise a manual query on the 200 web portai.	
Found Pre- Thresholds	For both of these qualifiers, the child's Date of Birth is checked. If the child is born on or before 31/12/2015, the child is eligible and a Not Found result is converted to Found. Otherwise the result	
Found Pre- Thresholds Manual Process	should stay as Not Found.	

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



Creating a Dummy Base (2YOF)

To import 2YOF applications from the Citizen Self Service portal, a dummy base must be created as a B2B:Student Base and a user must be mapped to the dummy base to identify that a record has been received from the Citizen Self-service portal.

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

The dummy base should have been set up by the One Administrator for the User_ID set up for processing 2YOF applications.

More Information:

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

07 | Making Applications

Introduction to Making Applications

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

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

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

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

Information about the parent, carer or guardian and their family is also accessed from the **Home** page. For more information, see <u>My Family</u> on page 56.

The parent, carer or guardian will receive messages are from the local authority regarding the status of their application. For more information, see <u>Messages</u> on page 64.

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.

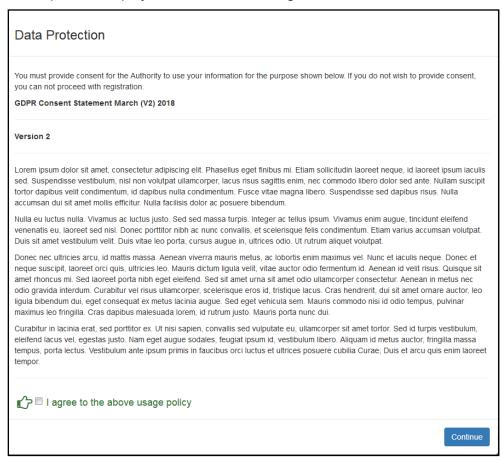
When they register, they will be asked to agree to the GDPR Consent Statement.

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.

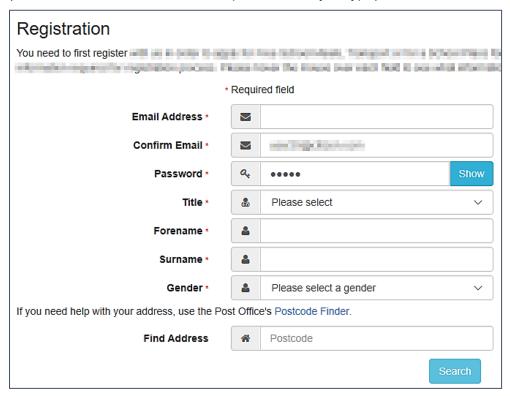


2. Click the **Register** button on the navigation bar or click the **Please register** link on the **Login** panel to display the **Data Protection** window with the current GDPR Consent Statement. There is an option to display the information in English or Welsh.

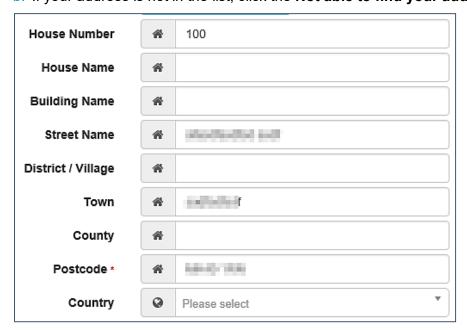


3. Read the contents of the statement. Select the check box to agree to the GDPR Consent Statement and click the **Continue** button to display the **Registration** page.

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.



- 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 <u>Postcode Finder</u>.
- 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.



Enter the new address details; Postcode is mandatory

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



- 8. Click the **Submit Registration** button; you will receive an email asking you to activate your account by confirming your email address.
- 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.
- If the LA has updated its Data Protection Consent Statement, a Data Protection dialog is displayed. For more information, see <u>Update Data Protection Consent Statement</u> on page 47.
 - 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. For more information, see <u>Two Step Verification</u> on page 47.

GDPR Update

Update Data Protection Consent Statement

When a Local Authority updates its Data Protection Consent Statement, you must confirm that you agree for the information you have provided, and will provide in future, to be used for the purposes described in the Consent Statement.

If you do not wish to give consent to the updated Consent Statement, your account will be disabled and the Authority will invoke its Withdrawal of Consent procedures.

Two Step Verification

Enabling Two Step Verification

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

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

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

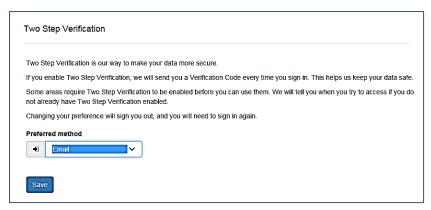
To set up two step verification:

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



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

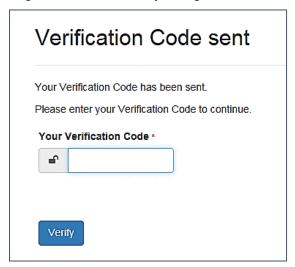
Making Applications



- 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:



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

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

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

Disabling Two Step Verification

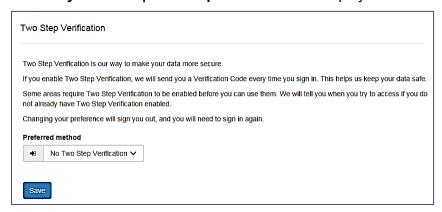
The two step verification process is mandatory for users of Special Educational Needs & Disabilities (SEND) and therefore cannot be disabled. If you try to access the SEND module, the following message is displayed:

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

To disable two step verification in a different module:

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

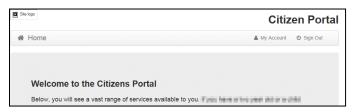
2. Select My Account | Two Step Verification to display the Two Step Verification page.



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

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

Home Page



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

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



From here, the Citizen portal user can manage their account, check the validity of extended entitlement codes, make applications for school places, free school meals, transport, courses,

funded early education for two year olds and complete special educational needs and disabilities forms. They can also view any messages from the local authority regarding their applications and make changes to their family.

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

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

- Personal Details
- Contact Details
- Change Email Address
- Change Password
- Change of Circumstances
- 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.



5. Click the Save button.

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

Contact Details

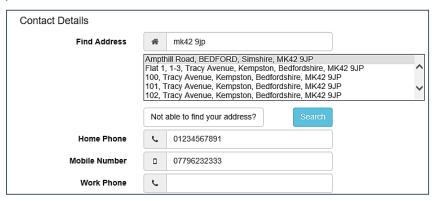
To edit your contact details:

- 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.

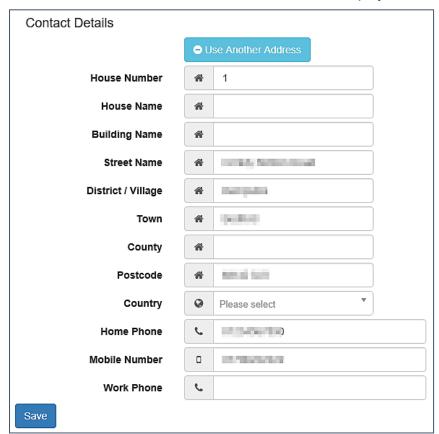


4. To edit your address, click **Use Another Address** to display the **Find Address** dialog.

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



- 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.



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.
- 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

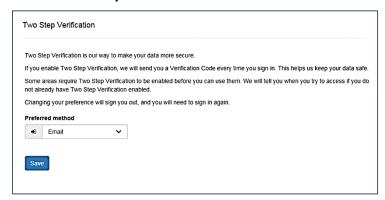
Two step verification is an additional process to increase your security when logging onto the Citizen Portal.

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:

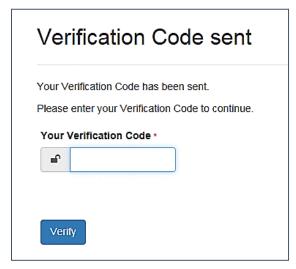
- 1. Log onto the Citizen Portal using the email address and password you used to register.
- 2. Select My Account at the top of the page.
- 3. Select Two Step Verification.



- 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:



- 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.

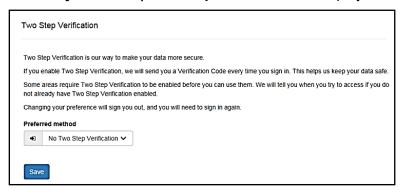
Disabling Two Step Verification

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.



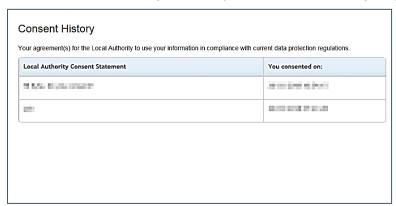
- 2. Select **No Two Step Verification** from the **Preferred method** drop-down.
- 3. Click the Save button.

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.



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.

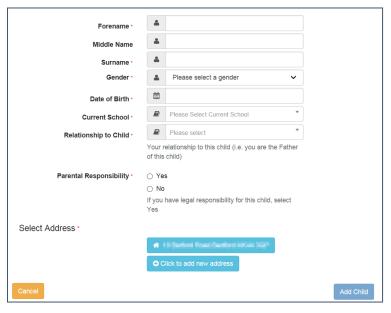
More Information:

For more information, refer to Adding a Child on page 57.

Adding a Child

To add a child to a parent's account:

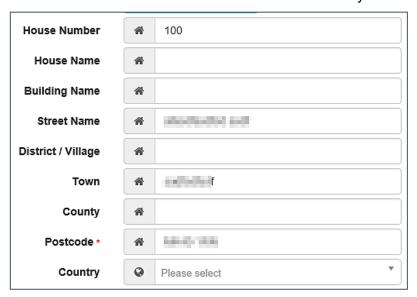
1. Select Citizen Portal | Home | My Family | Add Child to display the Add Child dialog.



- 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.
 - Enter the <u>full Postcode</u> 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.



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.

Making Applications For Two Year Old Funding

The One Citizen Self Service portal provides full support for parents, carers and guardians to make applications for funded early education for two year olds, integrating with the One Early Years (EY) module.

All of 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.

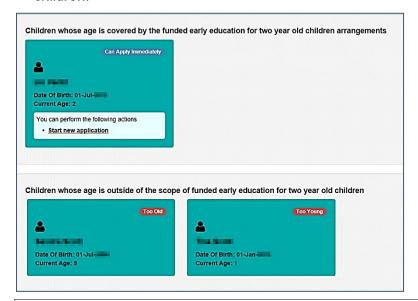
To make an application for two year old funding, the parent completes the following procedure:

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

Select Citizen Portal | Home | Funded Early Education for Two Year Olds to display the Funded Early Education for Two Year Old Children page. The page is divided into the following two sections:

Children whose age is covered by the funded early education for two year old children arrangements.

Children whose age is outside of the scope of funded early education for two year old children.

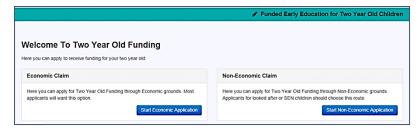


NOTE: The text for the above page is edited via One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | TYOFunding | Two Year Old Funding | EligibleChildrenTitleText and IneligibleChildrenTitleText.

If this is a first application, the parent, carer or guardian must add the child.

For an eligible child, click the **Start new application** link to display the **Welcome** page.

The parent, carer or guardian must now select whether they want to apply for two year old funding on economic or non-economic grounds.



Note: The Start Economic Claim button is now available for selection after Parental Responsibility has been changed from No to Yes in the Childs record.

For more information, see:

Making an Economic Application on page 60.

Making a Non-Economic Application on page 63.

NOTE: The text for the above page is edited via One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Provider Two Year Old Funding | Display

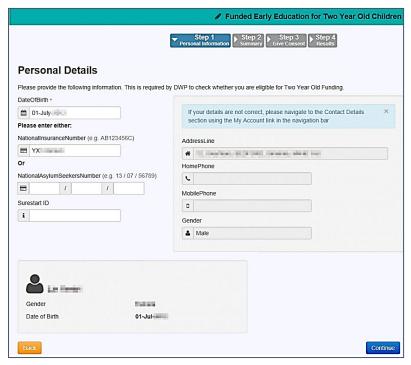
Attribute_TaskCodeEconomicClaimHelp/DisplayAttributeTaskCodeNonEconomicClaim and One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Provider Markdown | Economic ApplicationPanelContent/NonEconomicApplicationPanelContent.

Making an Economic Application

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

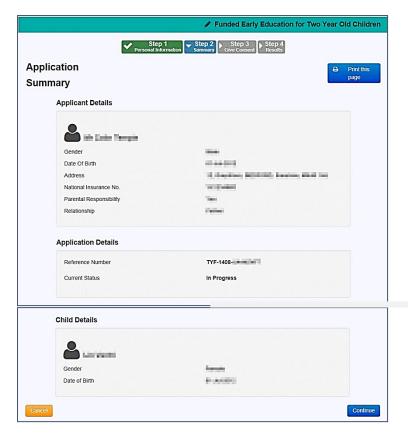
To apply for two year old funding on economic grounds, the parent follows the following procedure:

On the Welcome page, click the Start Economic Application button to display the Step 1
Personal Information page. This information is required by the Department for Work and
Pensions (DWP) to check whether the child is eligible for two year old funding.



NOTE: A validation check has been introduced to prevent a Carer from being added that is under 16 e.g. too young to have a National Insurance Number and therefore too young to be assessed for entitlement to 2 year old funding

2. Click the **Continue** button to display the **Step 2 Summary** page.

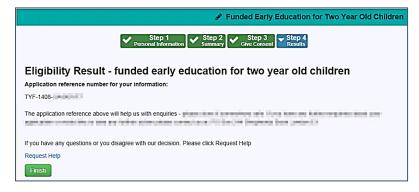


- 3. If required, click the **Print this page** button to print the **Application Summary** page.
- 4. Click the **Continue** button to display the **Step 3 Give Consent** page.



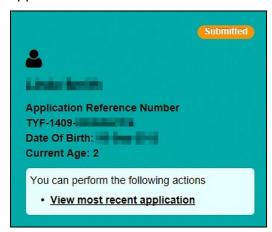
NOTE: The text for the above page is edited via One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | TYOFDeclaration.

- 5. Select the check box to confirm that you have read and agree to the declaration.
- 6. Click the **Confirm** button to display the **Step 4 Results** page.



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

7. Click the **Finish** button to return to the **Home** page. The application is displayed with the application status and reference number.



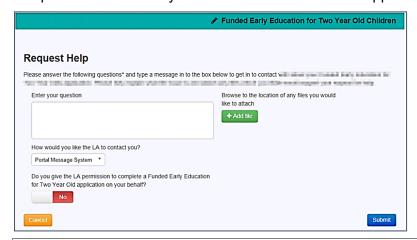
You can click the View most recent application link to see the Application Summary details.

Requesting Help

If the parent, carer or guardian has any questions regarding their application, they can request help from the local authority.

Clicking the **Request Help** button displays information on how the parent can contact the local authority.

They can attach files that they feel would help with their application. They can specify the method they would like to be contacted by. They can also give the local authority permission to complete a Funded Early Education for Two Year Old application on their behalf.



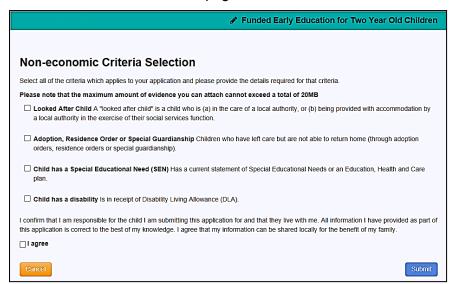
NOTE: The text for the above page is edited via One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Two Year Old Funding | RequestHelpHeaderText and RequestHelpHessageText and RequestHelpLAPermission and RequestHelpAttachmentText and RequestHelpLAContact.

Making a Non-Economic Application

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

To apply for two year old funding on non-economic grounds, the parent follows the following procedure:

On the Welcome page, click the Start Non-economic Application to display the Non-economic Criteria Selection page.



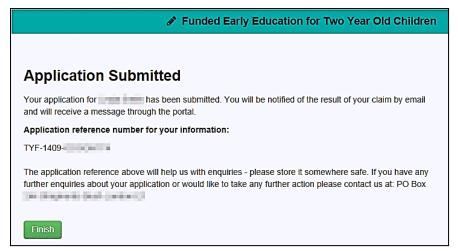
NOTE: The text for the above page is edited via One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | TYOFNonEconomicQuestionsGuidanceText and TYOFDeclaration.

2. Select the criterion which applies to the application.

Selecting a check box displays a text box enabling the parent to provide details to support their claim relating to the selected criteria.

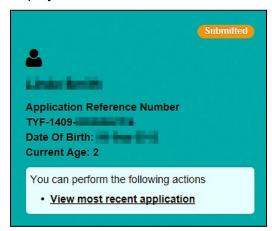
Files can be attached as additional evidence.

- 3. Select the check box to confirm that you have read and agree to the contents of the application.
- 4. Click the **Submit** button to display the **Application Submitted** page.



NOTE: The text for the above page is edited via One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | TYOFunding_NonEconomic Submitted / TYOFApplication Reference Heading | TYOFEligibilityStatusFurtherInformation.

5. Click the **Finish** button to return to the **Home** page. The Two Year Old Funding application is displayed with the status and reference number.



You can 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:

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.

Responding to Requests

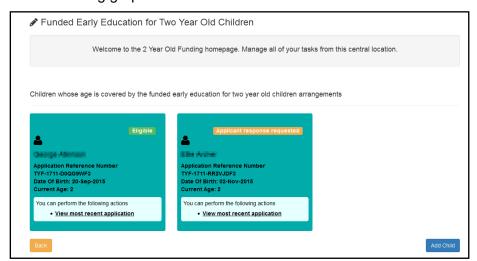
If the Local Authority requests further evidence or information to support an economic or non-economic funding claim, the provider or citizen can respond with the required information. The LA uses the Provider portal to configure whether text or file attachments or both can be sent.

More Information:

One Two Year Old Funding Provider Portal Handbook available on the One Publications website.

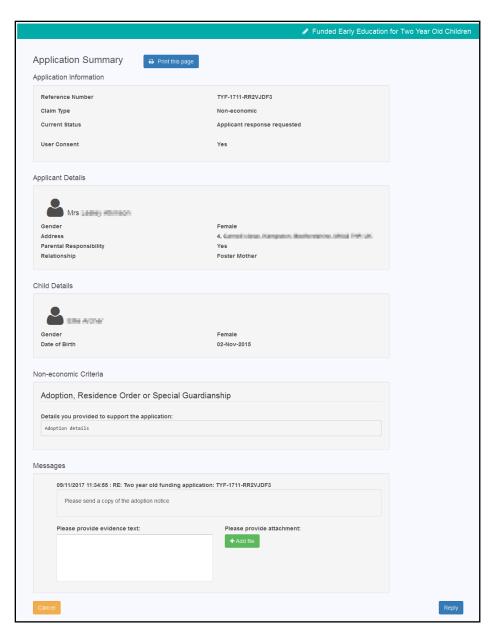
To reply to a request:

1. Select Citizen Portal | Home | Funded Early Education for Two Year Olds to display your current applications on the welcome page. If the Local Authority has requested information or evidence, the status Applicant response requested is displayed on the application as shown in the following graphic:

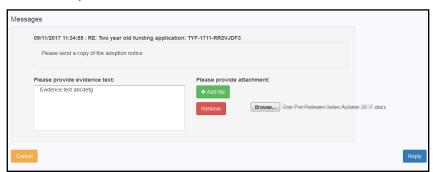


Click on the View most recent application link to view the Messages on the Application Summary page.

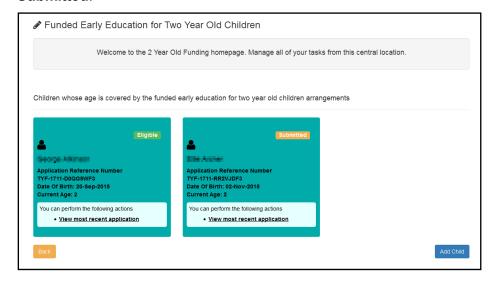
Making Applications



- 3. If required, enter the required evidence text.
- 4. To send file attachments:
 - a. Click the **Add File** button to display the browse button.
 - b. Click the browse button and select a file.
 - c. Click the Open button.



5. Click the **Reply** button to send the information to the Local Authority and update the status to **Submitted**.



Index

Application Settings	
Application Type Settings	
Cache	31
Citizen Portal	
General Administration	
Making Applications	43
Managing Users	7
Two Year Old Funding Administration	39
Citizen Portal Admin	
Logging In	10
Citizen Portal Home Page	11
Citizen Self Service Administration	5
Citizen Self Service Portal	
Administrator	7
Overview	
Using this Handbook	6
Consent History	55
Data Protection Consent Statement	47
ECS Settings	17
Edit Resources	
Configuring Automatic Emails	29
GDPR Administration	
Update Data Protection Consent Statement.	
GDPR Administration Page	12
General Administration	
Cache	
Configuring Application Settings	
Configuring Application Type Settings	
Configuring ECS Settings	
Configuring Message Settings	
Configuring Password Settings	
Configuring Scheduled Task Settings	
Configuring Site Settings	
Edit Resources	
Editing Resource Descriptions	
Introduction	
Portal Configuration	
Template Management	
Home Administration Page	
Home Local Authority Page	
Local Authority Page	12
Making Applications	60
Economic Applications	
Messages	
Non-economic Applications	
Requesting Help Two Year Old Funding	50
Message Settings	
Messages My Account	
Change Email Address	
Change of Circumstances	
Change Password	
Consent History	
Personal Details50,	
Two Step Verification	
Withdraw Consent	

My Family	56
Parents Making Applications	
Adding a Child	57
Home page	49
Introduction to Making Applications	43
Logging in to the Citizen Portal	46
My Family	56
Registering for a Citizen Portal Account	44
Password Settings	
Passwords	•
Forgotten Password	9
Portal Configuration	
Application Settings	
Application Type Settings	21
ECS Settings	17
Message Settings	
Password Settings	
Scheduled Task Settings	
Site Settings	
Resource Descriptions	
Scheduled Task Settings	
Site Settings	
Template Management	
Creating a Template	
Deleting a Template	
Editing a Template	
Templates	
Creating a Template	23
Deleting a Template	
Editing a Template	25
Viewing Templates	
Two Step Verification47	
Two Year Old Funding Administration	
Creating a Dummy Base	
Introduction	
User Management	
v4 Online	
Logging In	7
Passwords	
Withdraw Consent	