oneeducation

Transport Online

last updated for the Spring 2020 (3.71) release

Handbook

CAPITA

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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 26.
		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.
		When making a transport application, Welsh users can view Yes/No answers on the Summary page in Welsh. Gender can also be displayed in Welsh. See *Making a Transport Application* on page *68*.

Date	Release	Description
January 2020	**3.70.100**	Changes have been made to the location of the Disbursement, SEND and LIF questions.
		Adding Additional Questions (Transport) - these questions are now configurable in this area.
		See *Adding Additional Questions (Transport)* on page *38*
		Step 3 Commencement Details page no longer displays these questions. **Step 4 Additional Info** page – these questions are now configurable and will be displayed on this page.
		See *Making a Transport Application* on page *68*
		Adding Additional Questions (Transport) – there is now an additional language option on the **Additional Questions Form**:
		Question to ask the user (English) Question to ask the user (Welsh)
		See *Adding Additional Questions (Transport)* on page *38*
		Applicants can now select the start dates of the academic year when making a transport application.
		Step 3 Commencement Details page now displays 'When do you need transport from?' instead of 'Date you would transport to start' with options for **Start of school year** and **Another Date**.
		See *Making a Transport Application* on page *68*
		There is a new tile in Administration to configure the **Application Start Dates**.
		See *Introduction to Transport Administration* on page *37*
		See *Configuring Application Start Dates* on page *50*

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 *56* See *Contact Details* on page *61* See *Adding a Child* on page *67* Please remember, the following applies within the **Transport Portal**: ■ Transport applicants can only select their home address (that has already been recorded in the One Citizen Portal) or a pre-existing address from One. See *[Making a Transport Application](#)* on page *68*
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:

- Administration
  - General Administration
    - Portal Configuration
    - Template Management
    - Configurable Question Library
    - Edit Resources
    - Cache
  - Home to School Transport Administration
    - Additional Questions
    - Conditional Questions
    - Eligible Schools
    - Application Status Notifications
    - Journey Notifications
    - File Uploads
    - Application Start Dates
- GDPR Administration
  - Configurable Question Library
  - GDPR Consent Statements
  - Cache
  - GDPR Email Alert Configuration
  - GDPR Consent Withdrawals
  - GDPR Consent Histories
- Local Authority
  - View All Applications
  - User Management.

At the end of this handbook, there is a section explaining how the parent, carer or guardian makes an application. For more information, see *Introduction to Making Applications* on page *55*.

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:
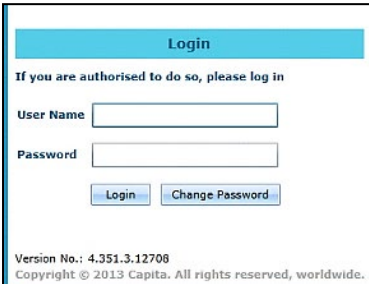 - your LA must have a Citizen Portal licence key.

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*.

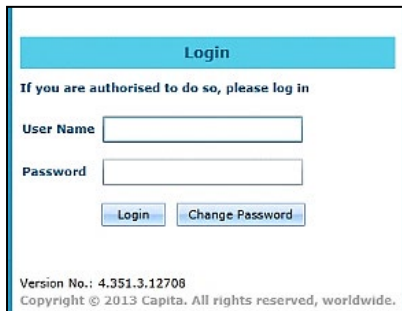4. Click the **Login** button to display the **Welcome to One** page.
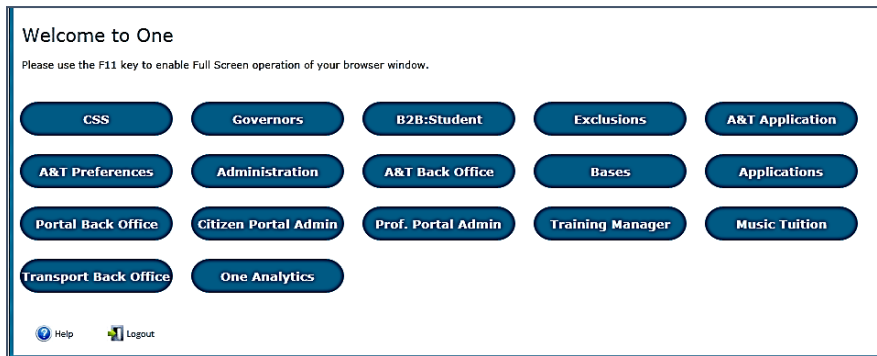
The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

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.

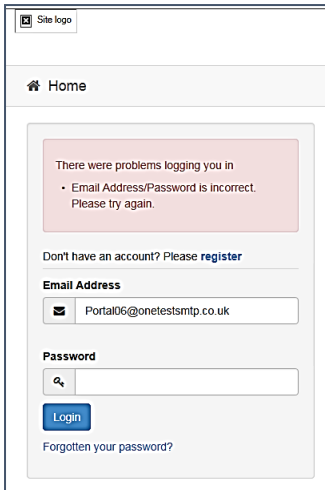5. Click the **OK** button.

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.
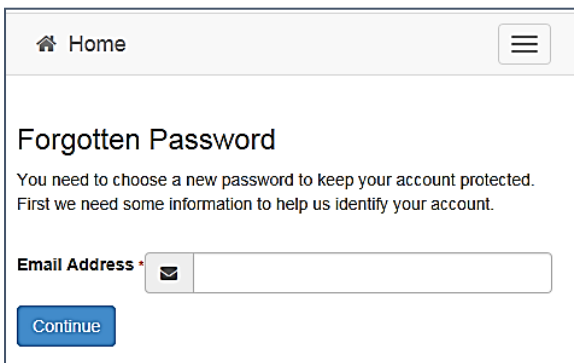
Check that you have entered the correct email address.
If you have forgotten your password, it will need to be reset.
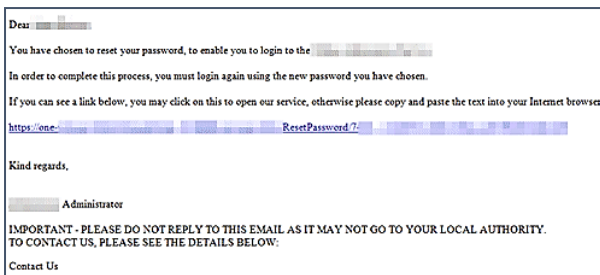
To reset a password:

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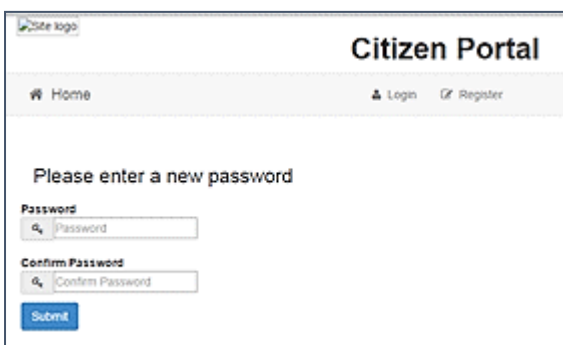

2. Enter your email address, then click the **Continue** button.

   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 <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 Permission**s.

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.
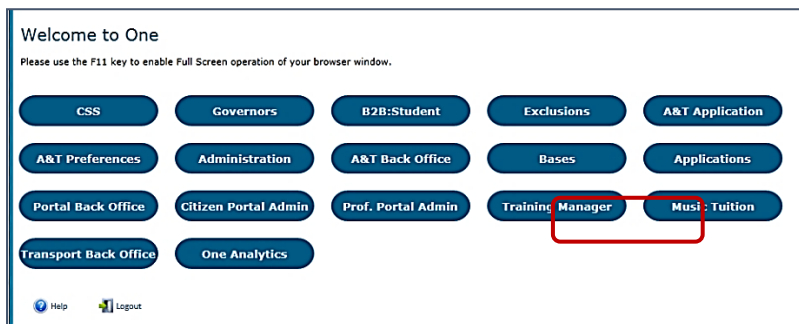
2. Click the **Citizen Portal Admin** button to display the **Announcements** page.
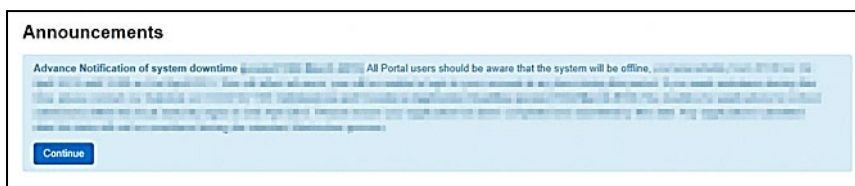
The **Announcements** page displays only if there are announcements regarding the portal.

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.
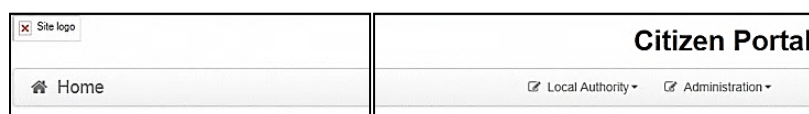
The Citizen Portal Home Page

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

- **Administration** – for more information, see the Home | Administration Page section on page *11*.

- **GDPR Administration** – for more information, see the *Home | GDPR Administration Page* section on page *12*.

- **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.

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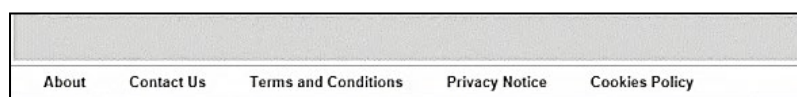
- **About** – displays information about the local authority. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_About**.

- **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:

- Transport Administration Handbook – the section on *Introduction to Transport Applications*.

  Clicking the **User Management** button displays the **User Management** page. For more information, see .

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**

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 *21*.

- **Template Management** – create, change or remove templates used within the messages. For more information, see the following sections:

  - *Template Management* on page *22*.

  - *Creating a Template* on page *22*.

  - *Viewing Templates* on page *24*.

  - *Editing a Template* on page *24*.

  - *Deleting a Template* on page *25*.

- **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:

• *Editing Resource Descriptions* on page *26*.

■ **Cache** – see which data is cached and clear the cache. For more information, see the following section:

Cache *on page* 29.

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.

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).

Configuring Application Settings

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

To configure the application settings:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.

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

Application Settings

Configure Application Settings

Admissions Online URL

Free School Meals application prefix

FSM

Free School Meals dummy base id

Transport application prefix

TRA

Transport dummy base id

Permitted Titles

Mr,Mrs,Miss,Ms,Dr,REV,Prof

Permitted Relationships

PAM,PAF,STM,STF,FOM,FOF,FAM,TCH,SWR,OTH

School Place application Permitted Faiths

Two Year Old Funding Application Prefix

TYF

Two Year Old Funding Placement Prefix

PLA

2 Year Old Funding Dummy Base Id

2 Year Old Funding application reference UDF field name

TYOFAPPREF

2 Year Old Funding application second applicant UDF field name

TYOFSECAPP

The current school base group

Training Manager Schools base group

SEND Dummy Base Id (Shared with Professional Portal)

SEND Form Submission Notification Email Addresses

3. Click the **Save** button.

Configuring Message Settings

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

To configure the message settings:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.

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

> **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.*
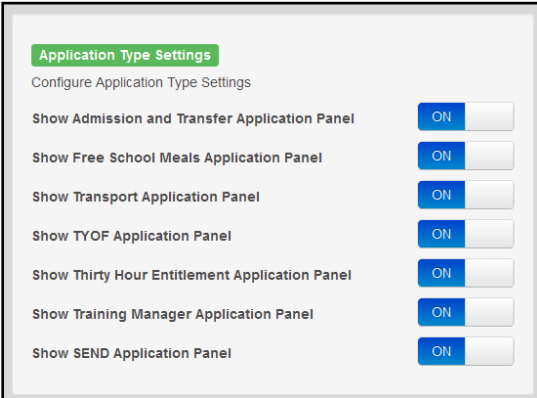
3. Click the **Save** button.

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:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.

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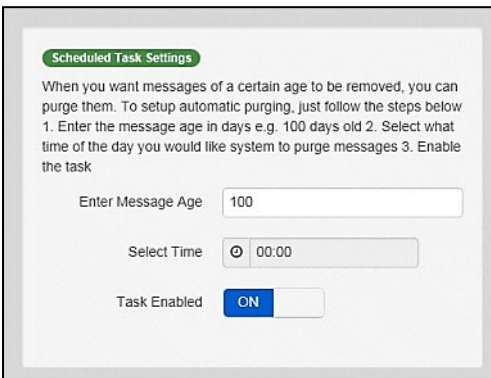
3. Click the **Save** button.

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.

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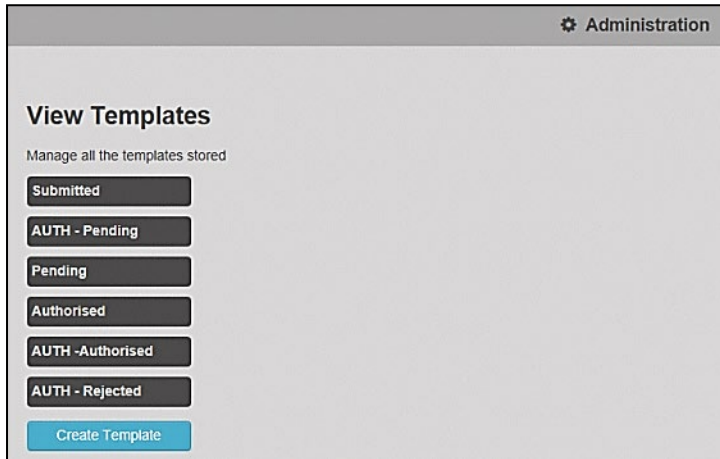
2. Click the template name to display the **Subject** and **Message** that are to be used in the message.
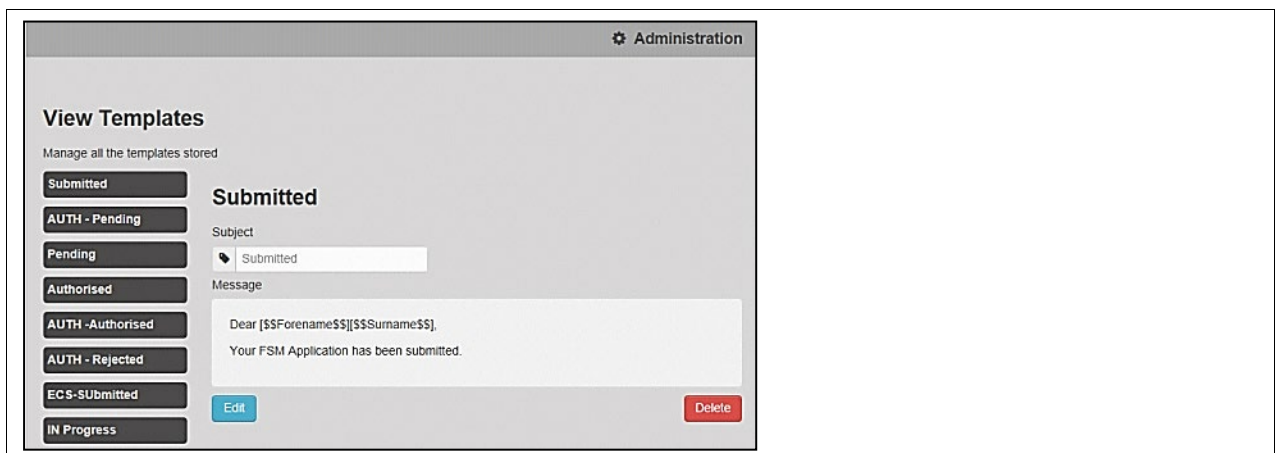
Editing a Template

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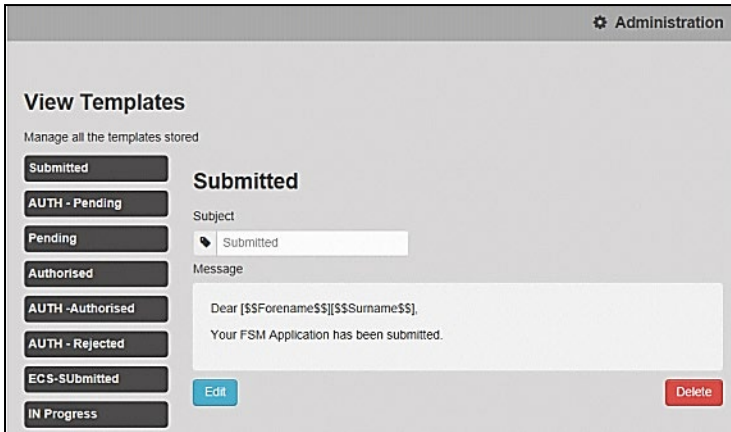
3. Click the **Delete** button to remove the stored template; you must confirm the deletion.

Configurable Question Library

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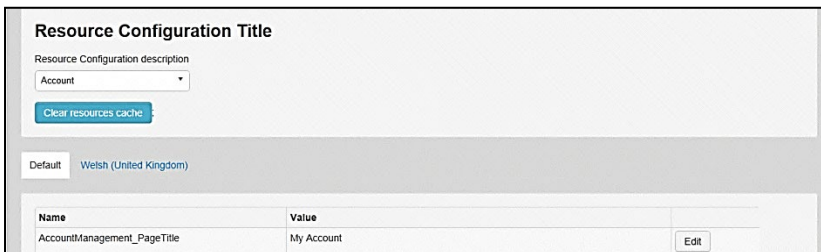
The default option is English (en). Click the **Welsh (United Kingdom)** button to display the Welsh (cy) descriptions.

2. Select an area from the **Resource Configuration Description** drop-down to display the Descriptions and Values associated with the resource types.
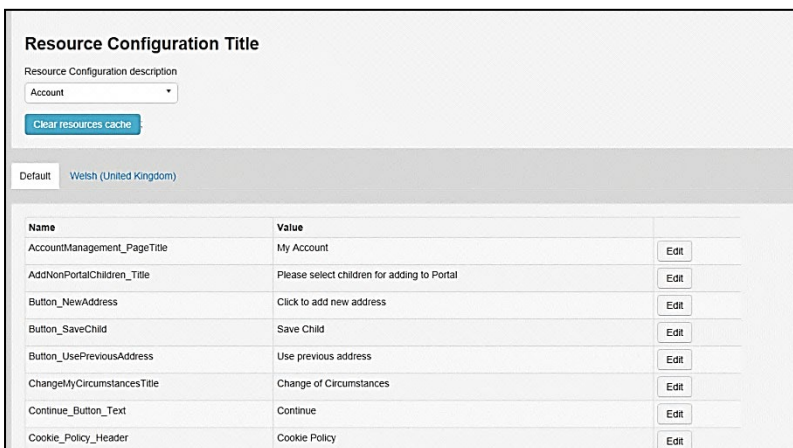
3. Click one of the **Edit** buttons next to a **Value** to display the **Edit Resource Title** dialog.

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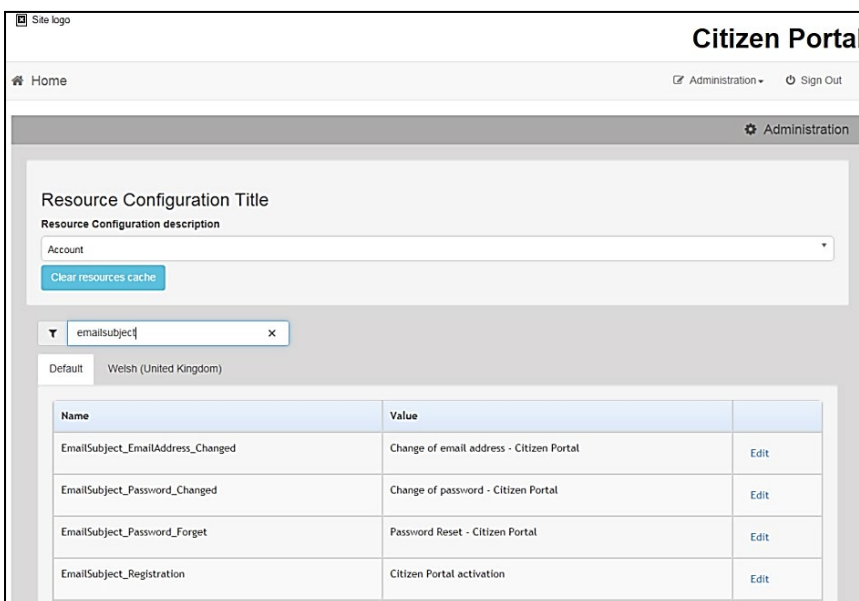
Portal administrators can now configure the text included with automatic emails, sent in response to the following actions in both the One Citizen Portal and the One Professional Portal:

- 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.
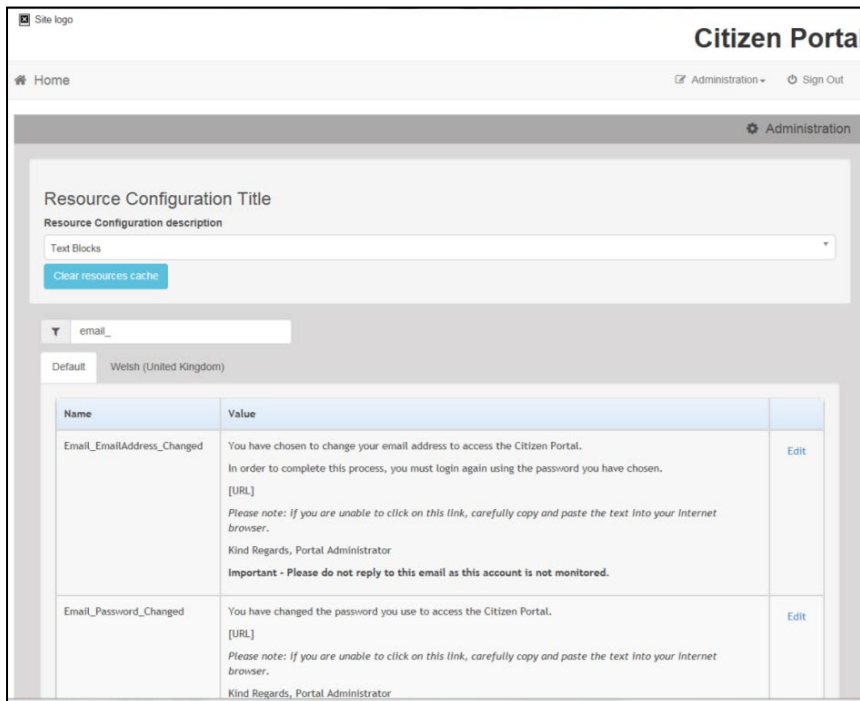
The configurable text block resource names are:

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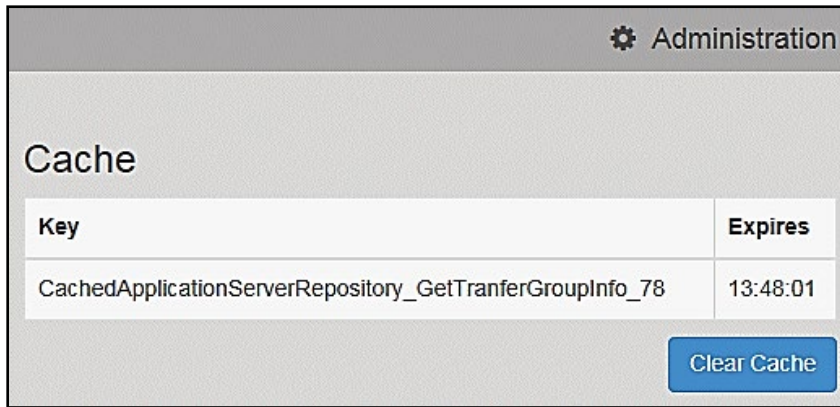
2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.

3. Click the **Save** button.

05 | General Data Protection Regulations Administration

Introduction to GDPR Administration

The **GDPR Administration** page is accessed via **v4 Online | Citizen Portal Admin | Home | GDPR Administration**.
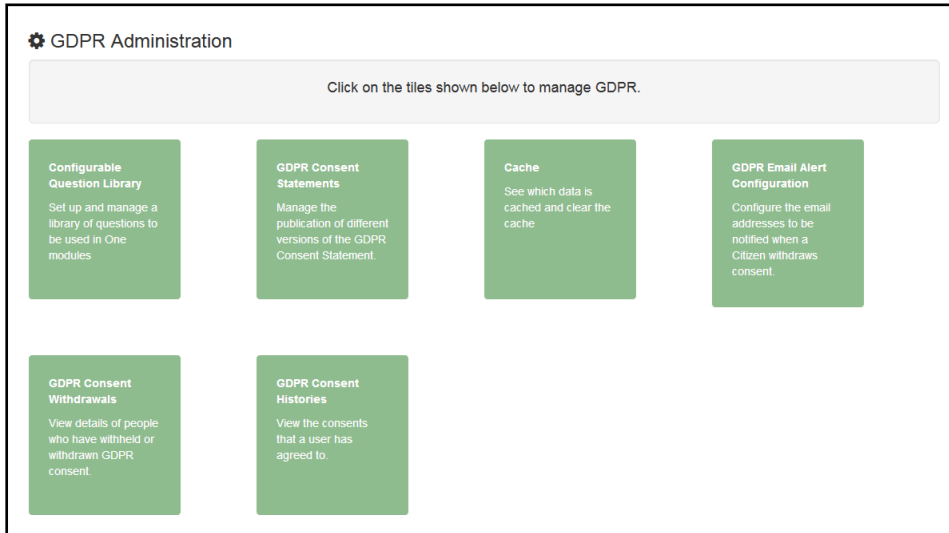
You can only access the **GDPR Administration** area if you have **Read-Write** permission for the **GDPR Administration** business process as shown in the following graphic:

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**.
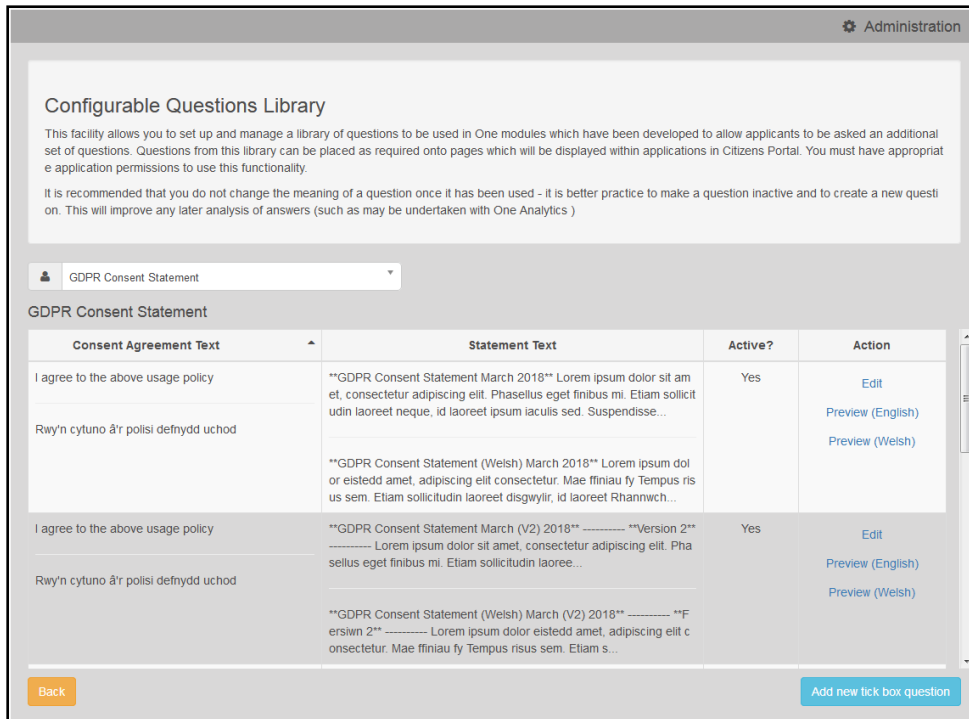
Adding a New Question

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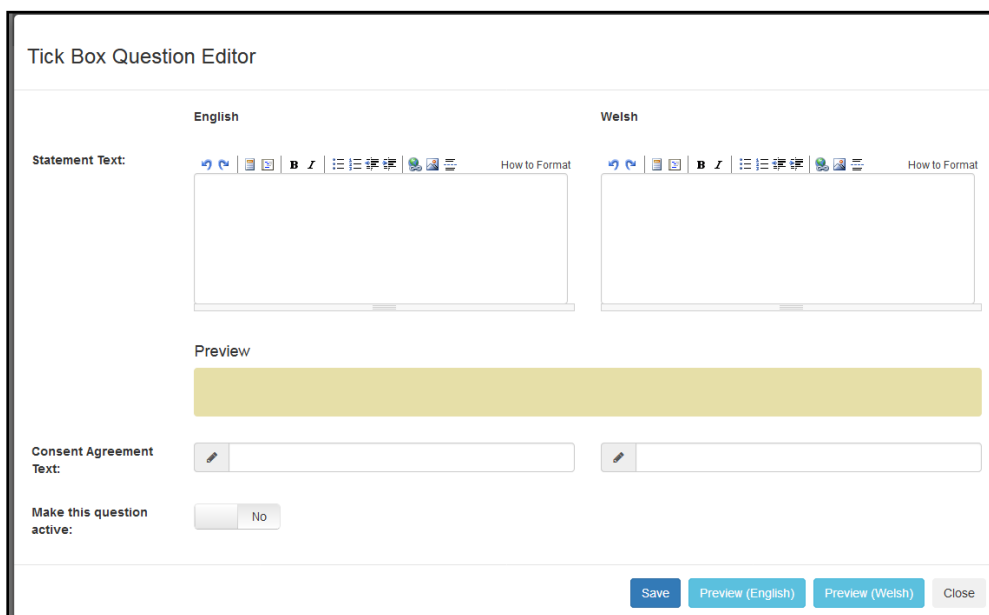
4. Enter the **Statement Text** (in either English or Welsh). This text is presented to the Citizen portal user and comprises the Consent Statement.

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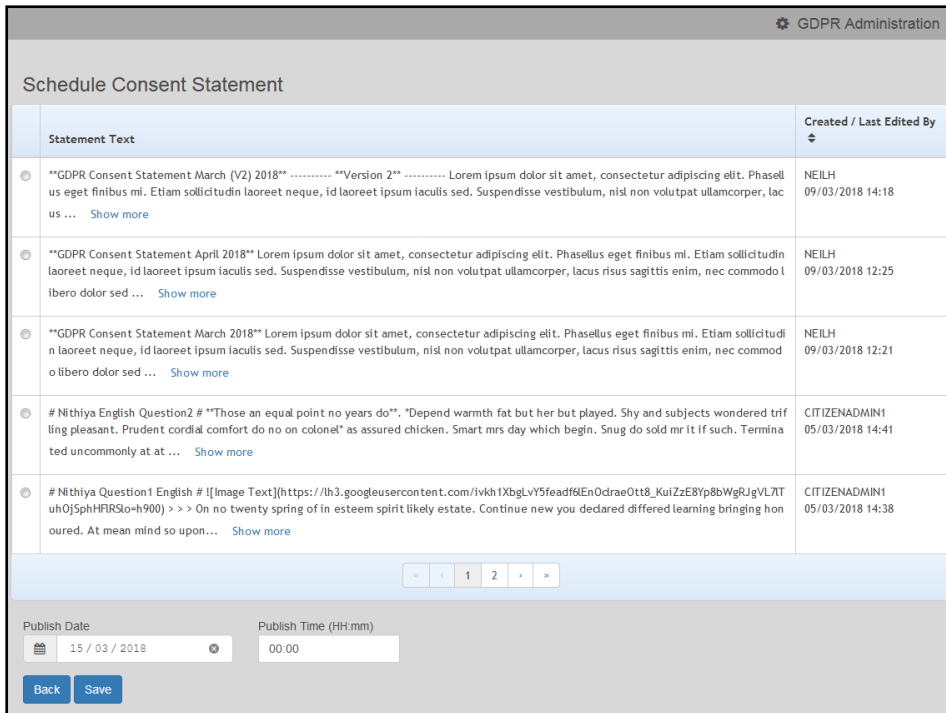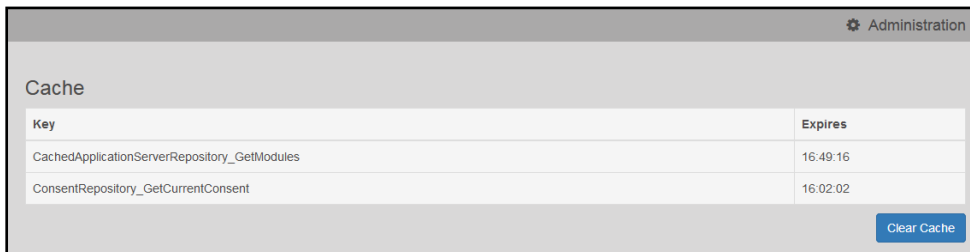
3. Select the radio button adjacent to the required statement and click the **Save** button.

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 | Transport Administration

Introduction to Transport Administration

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

Home to School Transport Administration

Additional Questions Configure the additional questions asked during Transport applications	**Conditional Questions** Configure the scenarios when additional questions should be shown	**Eligible Schools** Select the list of schools that can be used during a Transport application and configure the text	**Application Status Notifications** Configure the notifications sent to users when Application Status is changed
Journey Notifications Configure the notifications sent to users when a journey is created or modified	**File Uploads** Configure which files can be uploaded as part of an application	**Application start date** Configure the defualt application start date	

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

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

One Transport uses the same import method as One B2B:Student. Before this import process can begin, a dummy base <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**.

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

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

- **Additional Questions** – Configure the additional questions asked during Transport applications.

- **Conditional Questions** – Configure the scenarios when additional questions should be shown.

- **Eligible Schools** – Select the list of schools that can be used during a Transport application and configure the confirmation text shown to users.

- **Application Status Notifications** – configure the notifications sent to user when the application status is changed.

- **Journey Notifications** – Configure the notifications sent to users when a journey is created or modified.

- **File Uploads** – Configure which files can be uploaded as part of an application.

- **Application Start Date** – Configure the default application start date.

For more information on how parents, carers and guardians make a transport application via the Citizen Self Service Portal see the *Making a Transport Application* help topic on page 68.

Creating a Dummy Base in One v4 Client (Transport)

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

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

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

Adding Additional Questions (Transport)

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

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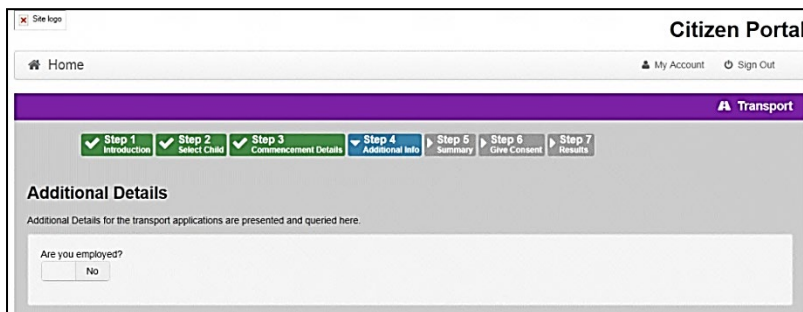
To configure additional questions:

1. Select **One v4 Online | Citizen Portal Admin | Administration**.

2. Click the **Transport Administration | Additional Questions** button to display the **Setup Additional Questions** page. Existing questions are displayed in number order.

   Disbursement, SEND and LIF questions are now configurable in this area.

Question Order	Question to ask the user(English)	Answer Type	Lookup for dropdown list	UDF	
1	Would issuing a school bus pass allow your child to get to school?	Boolean (true/false)		schoolbuspass	✖
2	What support if any would your child need in order to be access a school bus independently?	String		what support is required for the school bus	✖
3	Are you available to take your child to and from school?	Boolean (true/false)		can you take your child to school	✖
27	Lif	Dropdown list			✖

3. Click the **Add Question** button to display the **Additional Questions Form** dialog. Questions can be added in either English or Welsh.

4. Select an **Answer Type**.

   If you select the **Drop-down list** option, the **Lookup for dropdown list** field is displayed. Enter the **Table_ID** from **One v4 Client | Tools | Administration | Lookups**.

5. Enter your required text in the **Question to ask the user** field(s).

6. Enter the **Question Order** number.

   If you enter a number that has already been assigned to a question a duplicate number will be generated. Edit the subsequent question numbers to resolve this issue.

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

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

> *NOTE: UDFs are configured using the **UDF Manager** For more information on configuring UDFs see the **RG_Administration_Managing_UDFs** reference guide, available from www.onepublications.com and SupportNet*

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

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

Editing an Additional Question

To edit an existing additional question:

1. Select **One v4 Online | Citizen Portal Admin | Administration**.

2. Click the **Transport Administration | Additional Question**s button to display the **Setup Additional Questions** page. Existing questions are displayed in number order.

3. Click the question to display the completed **Additional Questions Form**.

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

5. Click the **Complete** button.

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

Email	AnswerType_Email
Decimal	AnswerType_Decimal
Drop-down list	AnswerType_DropDown
Boolean	AnswerType_Boolean
Integer	AnswerType_Integer

Adding Conditional Questions (Transport)

Conditional questions can be set by the local authority to be displayed as part of the Additional Question section of the transport application. It is not mandatory to configure conditional questions. However, any conditional questions that are set must be answered by the applicant before the application can be continued.

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

To configure conditional questions:

1. Select **One v4 Online | Citizen Portal Admin | Administration**.
2. Click the **Transport Administration | Conditional Questions** button to display the **Set Up Configurable Conditional Questions** page. Existing questions are displayed in number order.
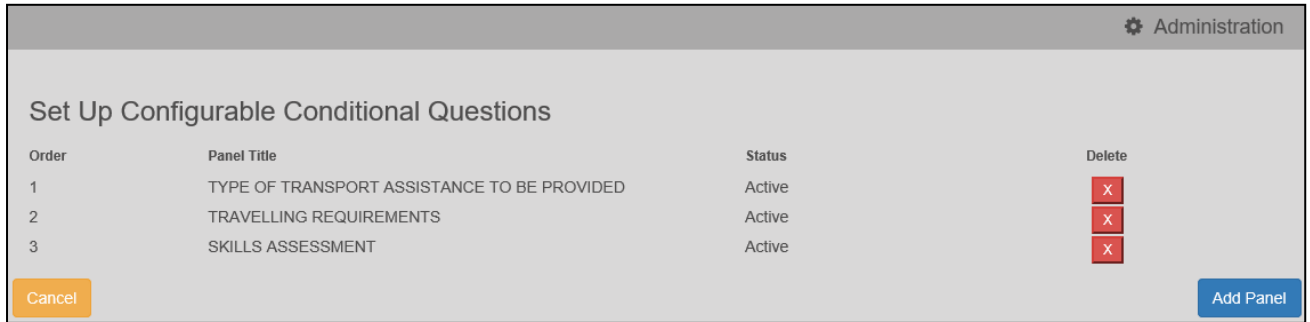
3. Click the **Add Panel** button to display a blank panel. **Panel Title** can be added in either English or Welsh.
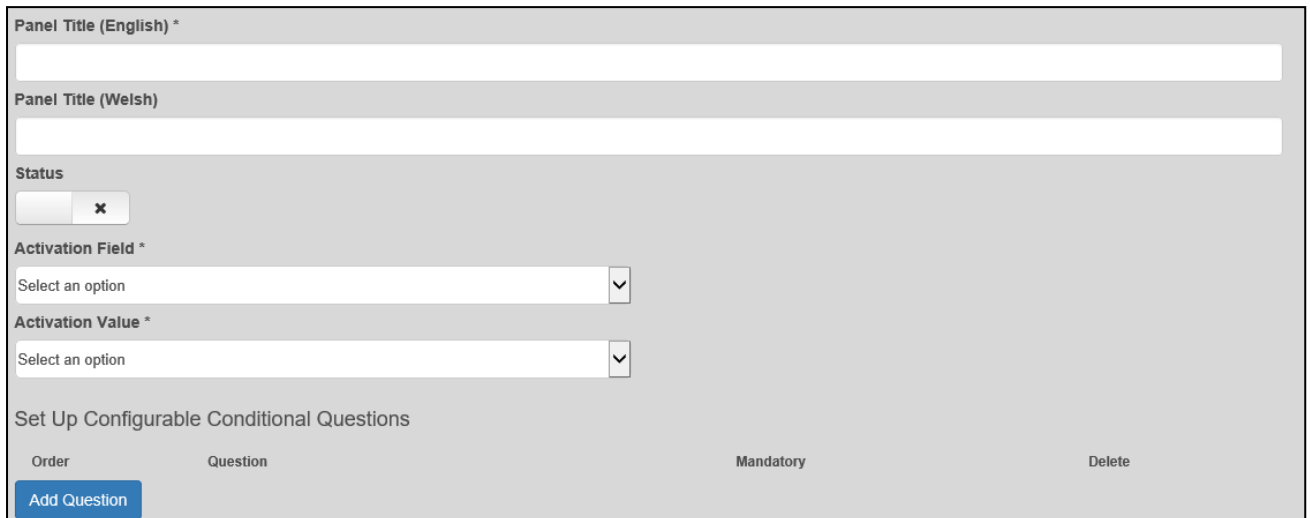
4. Click the **Add Question** button to display the Set Up Configurable Conditional Questions section.
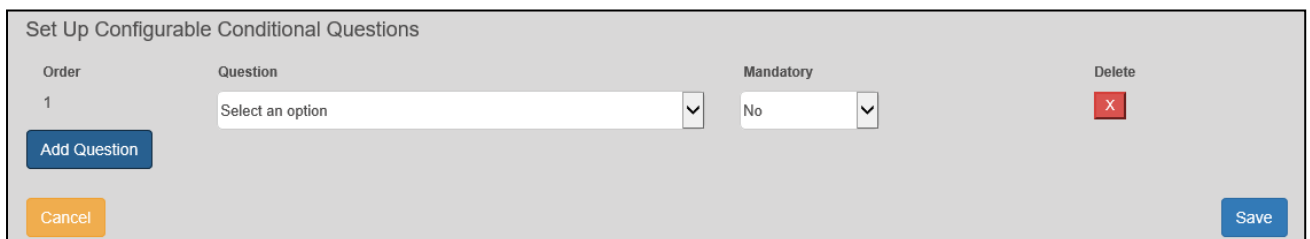
5. Select a **Question** from the **Drop-down list** option.

6. Select Yes or No from the **Mandatory Drop-down list** option.

7. Click the **Save** button to return to the **Set Up Configurable Conditional Questions** page.

Editing a Conditional Question

To edit an existing conditional question:

1. Select **One v4 Online | Citizen Portal Admin | Administration**.

2. Click the **Transport Administration | Conditional Questions** button to display the **Setup Configurable Conditional Questions** page. Existing questions are displayed in number order.

3. Click the question to display the completed **Conditional Questions** panel.

4. Make the required changes. All of the fields can be edited.
5. Click the **Add Question** button to add further questions to this panel.
6. Click the **X** button to delete a question from the panel.
7. Click the **Save** button.

Configuring Eligible Schools (Transport)

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

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

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

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

■ Configure Transport Schools
■ Configure Base Groups.

Configuring Transport Schools

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

1. Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Eligible Schools** to display the **Configure Transport Schools** page.
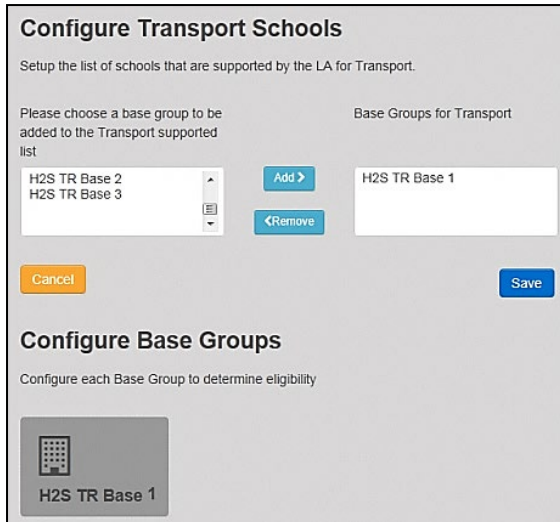
2. On the **Configure Transport Schools** panel, highlight the base group to be added to the Transport supported list and then click the **Add** button to transfer the base group to the **Base Groups for Transport** panel.

3. Click the **Save** button. The base group displays in the **Configure Base Groups** panel.

Configuring Base Group Display Text

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

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

To configure base group display text:

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

2. On the **Configure Base Groups** panel, click the required base group button to display the message options for the base group.
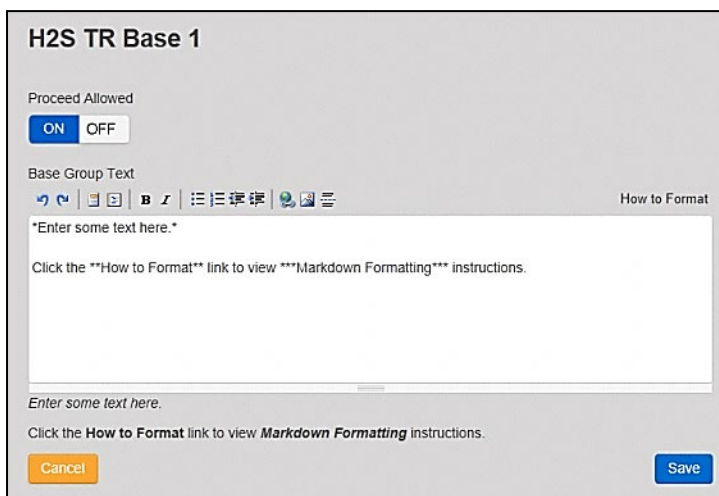
3. Ensure that the **Proceed Allowed** button is set to the **ON** position.

4. Enter the required text in the **Base Group Text** field. The formatted message is displayed below the memo field.

5. Click the **Save** button to return to the **Configure Transport Schools** page.

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

Configuring Application Status Notifications

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

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

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

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

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

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

2. Select the status configuration you wish to edit notifications for. There are five available options:

   ◼ **In Progress Configurations:** Applications which are incomplete (i.e. not yet submitted).

   ◼ **Submitted Configurations:** Applications which have been submitted but have not yet been added to Transport Back Office.

   ◼ **Approved Configurations:** Applications with a status code of **Approved**.

   ◼ **Pending Configurations:** Applications with a status code of **Pending**.

■ **Rejected Configurations:** Applications with a status code of **Rejected**.

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

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

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

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

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

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

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

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

Configuring Journey Notifications

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

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

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

Adding a Journey Notification

1. Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Journey Notifications** to display the **Journey Notifications** page.
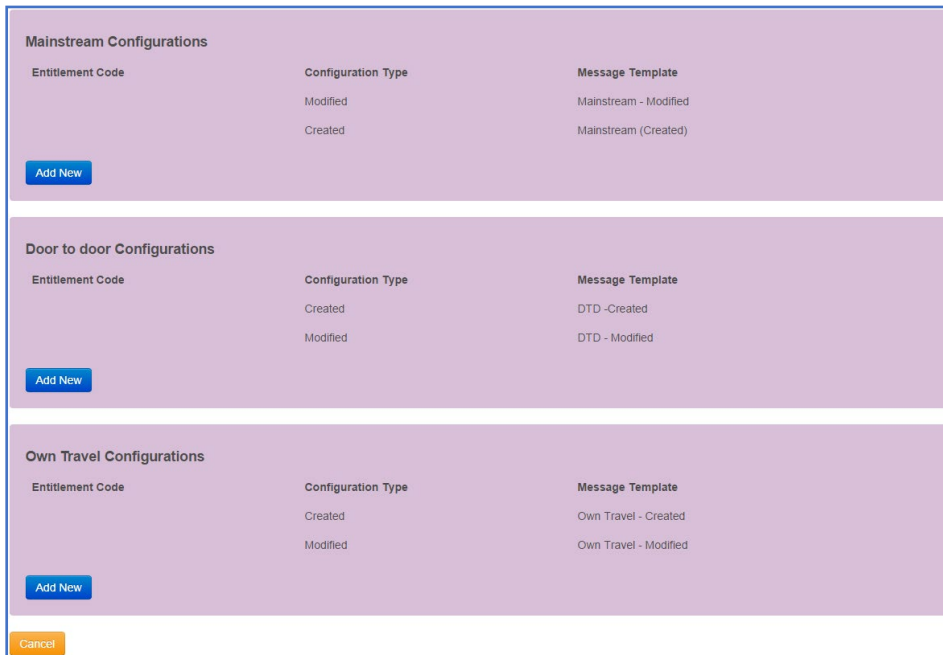
2. Click the **Add New** button in either the **Mainstream Configurations**, **Door to door Configurations** or **Own Travel Configurations** sections, depending on the type of journey notification you wish to create. The **Add/Edit Journey Notification Configuration** dialog is displayed.
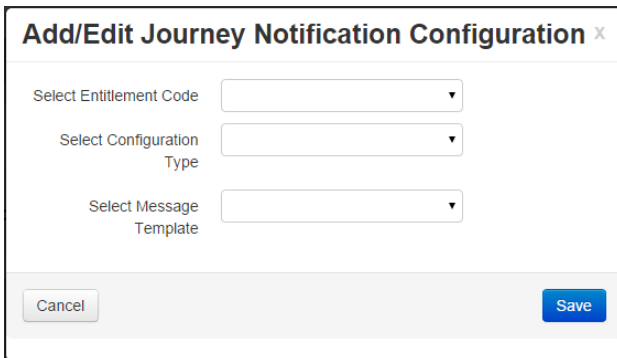
3. Select an **Entitlement Code**. Only journeys that correspond to an assessment or application with the chosen entitlement code will trigger the notification.

4. Select a **Configuration Type**. The available options are **Created** and **Modified**.

5. Select a **Message Template** for the notification.

6. Click the **Save** button to create the notification and close the dialog.

Editing a Journey Notification

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

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

3. Make the required edits.

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

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

Deleting a Journey Notification

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

2. Click the cross next to the notification you wish to delete. A confirmation dialog is displayed.
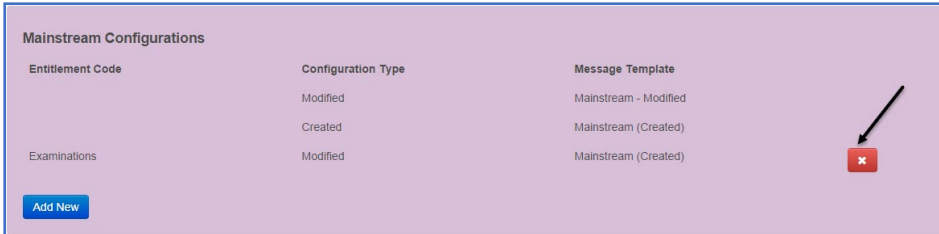
3. Click the **Confirm** button to delete the notification and close the dialog

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

Configuring File Uploads

Applicants can upload documents to support their application. Options presented will be **Accepted File Types**, **Maximum File Size** and **Maximum Number of Files**.

To configure file uploads:

1. Select **One v4 Online | Citizen Portal Admin | Administration**.

2. Click the **Transport Administration | File Uploads** button to display the **Setup File Uploads** page.
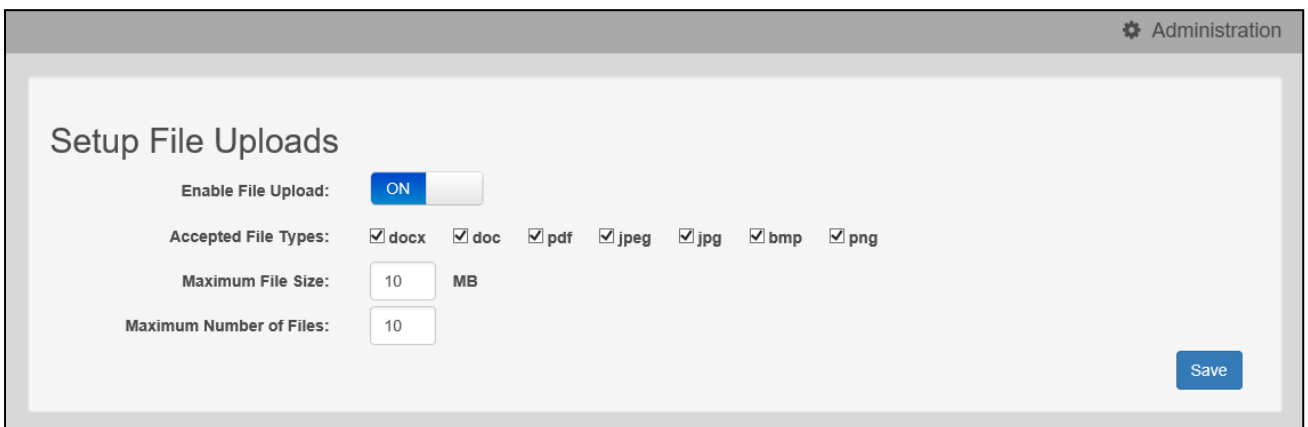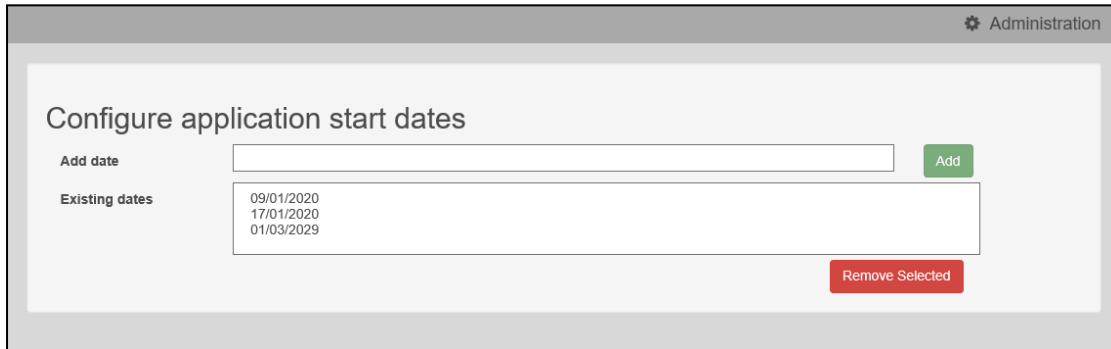
3. Select the check boxes of the **Accepted File Types** that the applicant will be able to upload.

4. Select the **Maximum File Size** in megabytes.

5. Select the **Maximum Number of Files** that can be uploaded.

6. Click the Save button.

Configuring Application Start Dates

Applicants can now select the start date that they would like the application to start from. Options presented will be **Start of school year** and **Another Date**. More than one option can be configured for the start of the school year.

Adding Application Start Dates

1. Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Application Start Date** to display the **Configure application start dates** page.
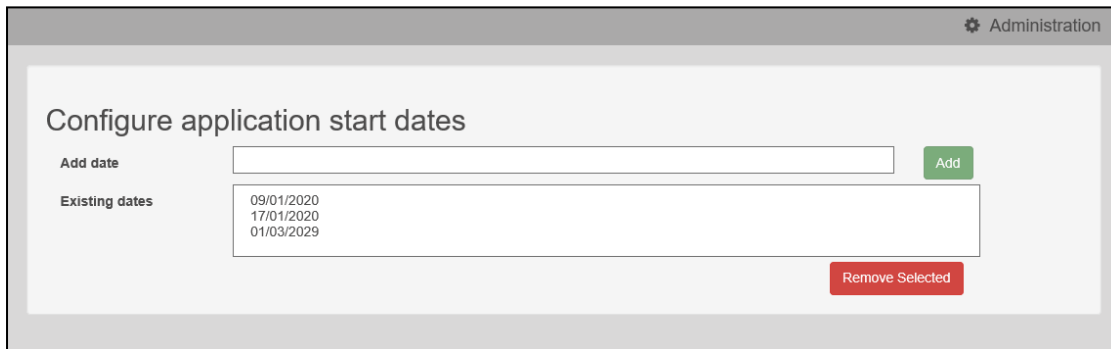
2. Select a start date from calendar.

3. Click the **Add** button to add the date to the Existing Dates field.

Removing Application Start Dates

1. Select **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Application Start Date** to display the **Configure application start dates** page.

2. Select a start date from the Existing Dates field.

3. Click the **Remove Selected** button to remove the date.

07 | **Transport Applications**

Introduction to Transport Applications

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

For more information on how parents, carers and guardians make a transport application via the Citizen Self Service Portal see the *Making a Transport Application* help topic on page 68.

Transport Applications

When a transport application is made via the Citizen Self Service portal, any child that could not be matched to a One student is processed via v**4 Online | Portal Back Office | Data Transfer**. This screen is also used to process matched children who have some conflicting data with the child they are matched to. The incoming students are listed under the Transport Dummy Base.

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

> **More Information:**
>
> *Matching Students via One Portal Back Office Handbook*, available from www.onepublications.com.

Managing Transport Applications

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

For more information on how parents, carers and guardians make a transport application via the Citizen Self Service Portal see the *Making a Transport Application* help topic on page 68.

Searching for a Transport Application

To search for a Transport application:

1. Select **One v4 Online | Citizen Portal Admin | Local Authority | View All Applications** to display the **Applications Search Filters** panel.
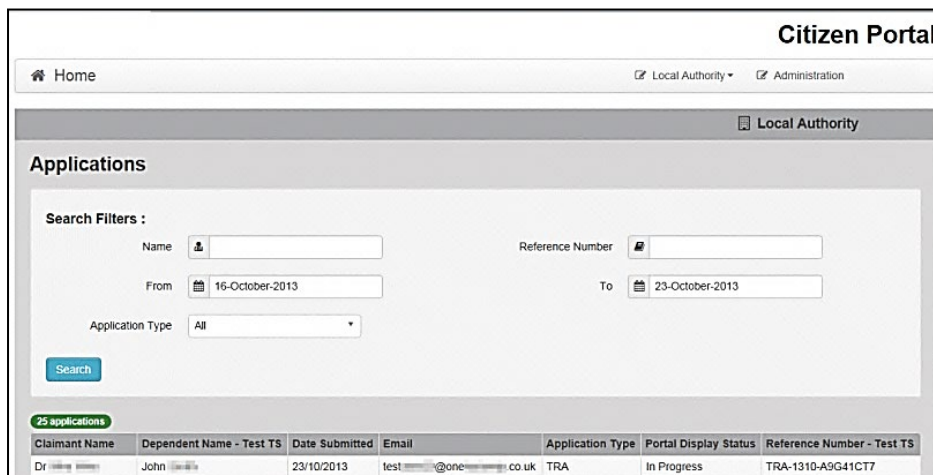
The list of applications, and the total number, display in the browse below the **Search Filters** panel.

2. Select a filter. You can search using one or multiple filters:

   - **Name** – this searches on both the Claimant Name and the Dependent Name fields.

   - **Reference Number** – you can search on a partial reference number. The type of application is indicated by the first three letters - TRA.

   - **From** – select a date from the drop-down.

   - **To** – select a date from the drop-down.

   - **Application Type** – click the drop-down and select from **Transport**.

3. Click the **Search** button to display the applications according to the **Search Filters**.

Claimant Name	Dependent Name	Date Submitted	Email	Application Type	Portal Display Status	Reference Number
Dr		23/10/2013		TRA	Eligible	TRA-1310-YJLTMRT2
Mrs		23/10/2013		FSM	In Progress	FSM-1310-8SVG9GF3
		23/10/2013		TRA	Submitted	TRA-1310-A9G41CT7
		23/10/2013		FSM	Refused	FSM-1310-FM6ZF5F3

Reviewing Transport Applications

To review Transport applications:

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

Claimant Name	Dependent Name	Date Submitted	Email	Application Type	Portal Display Status	Reference Number
Dr		23/10/2013		TRA	Eligible	TRA-1310-YJLTMRT2
Mrs		23/10/2013		FSM	In Progress	FSM-1310-8SVG9GF3
		23/10/2013		TRA	Submitted	TRA-1310-A9G41CT7
		23/10/2013		FSM	Refused	FSM-1310-FM6ZF5F3

Optionally, use the **Search Filters** panel to reduce the number of applications.

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

Application Summary

Claimant Details

Name of Claimant

Gender

Date of Birth

Address

Home Phone

Mobile Number

National Insurance No.

One Person ID

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

- Application Details

  - Application Reference Number

  - Current Status

  - Requested start date

  - Disbursement

- Special Transport Needs
- Transport Destination
- Address that Transport is required from

■ Children

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

■ Additional Information

- Additional Free School Meals or Transport questions. For more information, see Adding Additional Questions (Transport) on page 38.

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

08 | **Making Applications**

Introduction to Making Applications

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

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

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

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

Information about the parent, carer or guardian and their family is also accessed from the **Home** page. For more information, see *My Family* on page *66*.

The parent, carer or guardian will receive messages are from the local authority regarding the status of their application. For more information, see *Messages* on page *74*.

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 Verificatio**n
- **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.
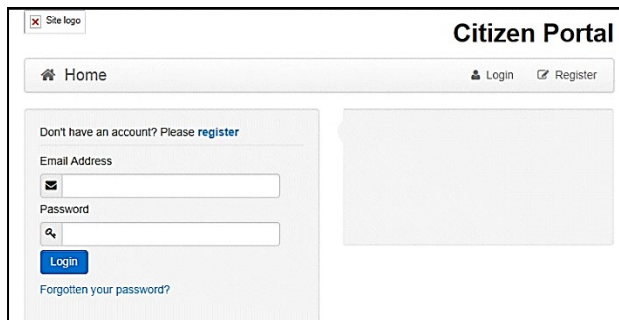
Creating an Account

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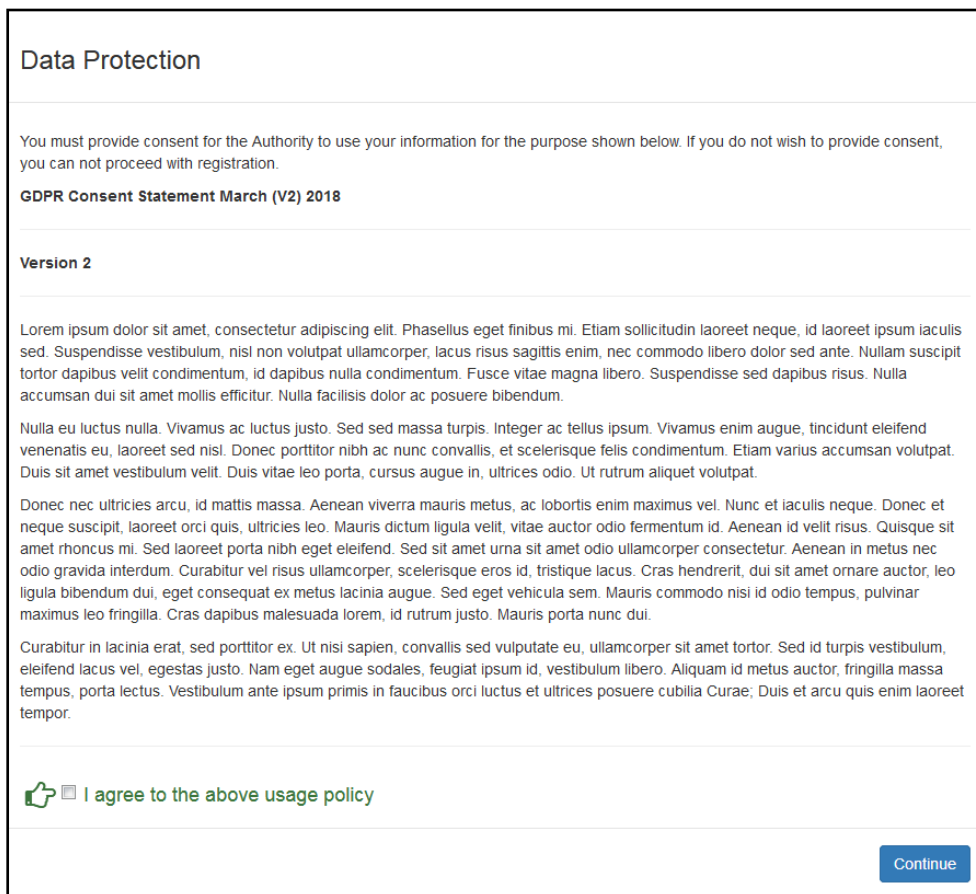
When they register, they will be asked to agree to the GDPR Consent Statement.

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**.

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.

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

7. The **Home Phone**, **Mobile Number** and **Work Phone** are optional.
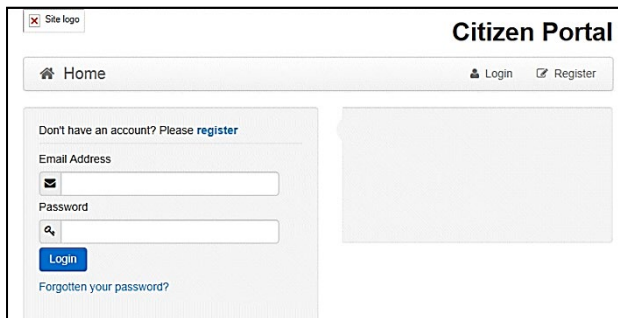
8. Click the **Submit Registration** button; you will receive an email asking you to activate your account by confirming your email address.

9. Click the link in the email to confirm your email address and complete the registration. You can now log in to the One Citizen Self Service portal, using the password you created when you registered.

Logging in to the Citizen Portal

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

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

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

3. Enter your **Password**.

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

> *Note: The **Announcements** page displays only if the local authority has set up any announcements regarding the portal.*
>
> The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | Announcements**.

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

6. If the LA has updated its **Data Protection Consent Statement**, a **Data Protection** dialog is displayed.

    i. On the **Data Protection** dialog, select the checkbox to agree to the confirmation.

ii. Click the **Continue** button. A confirmation message displays to conform your consent

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

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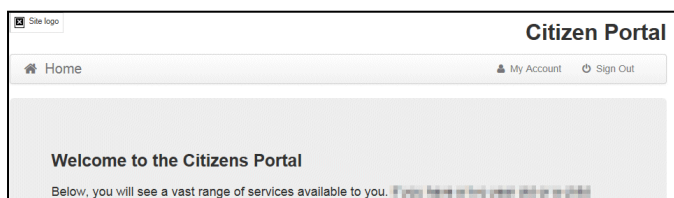
The **Home** page displays the following services that are available to the parent, carer, guardian or young person:

- 30 Hour Entitlement
- Free School Meals
- School Places
- Special Educational Needs and Disabilities
- Transport
- Courses
- Funded Early Education for Two Year Olds
- Messages
- My Family.
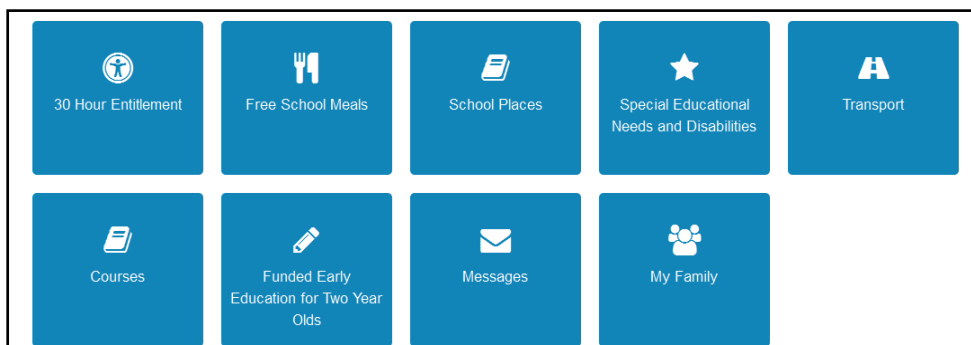
From here, the Citizen portal user can manage their account, check the validity of extended entitlement codes, make applications for school places, free school meals, transport, courses, funded early education for two year olds and complete special educational needs and disabilities forms. They can also view any messages from the local authority regarding their applications and make changes to their family.

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

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

- **Personal Details**
- **Contact Details**
- **Change Email Address**
- **Change Password**

- **Change of Circumstances**
- **Two Step Verification**
- **Consent History**
- **Withdraw Consent.**

For more information, see

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.
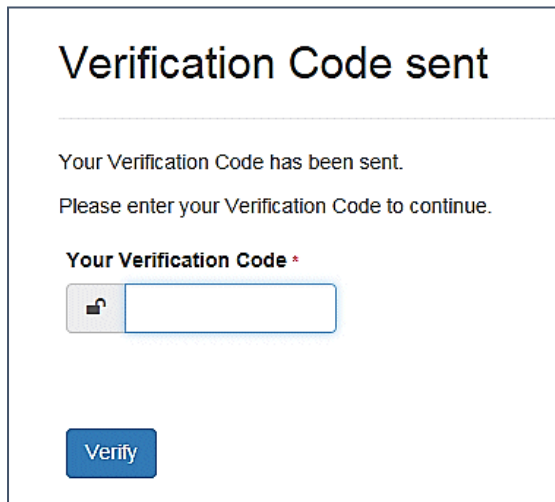
Contact Details

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 Contact us to open an email.

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

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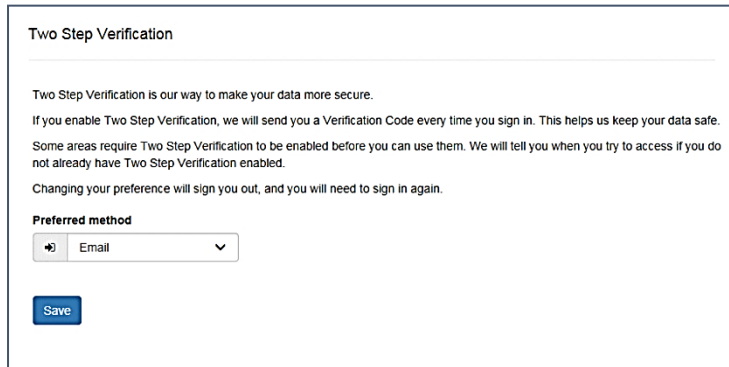
Two step verification is an additional process to increase your security when logging onto the Citizen Portal.

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

Enabling Two Step Verification

To set up two step verification:

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

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

3. **Select Two Step Verification**.

Two Step Verification

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

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

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

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

Preferred method

Email

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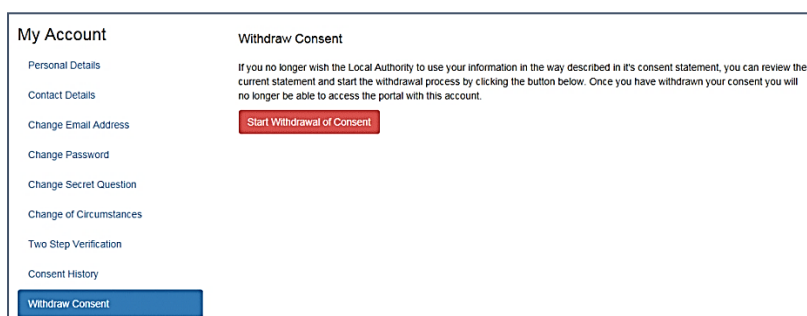
4. Click the **Start Withdrawal of Consent** button to display the **Data Protection** dialog.

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.

My Family

The **My Family** area of the **Home** page displays the details about the parent, carer or guardian making an application.
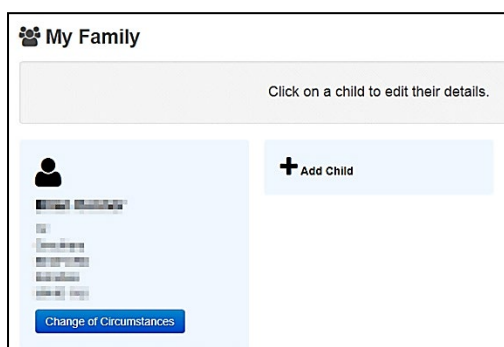
Clicking the **Change of Circumstances** button displays a message from the local authority to contact them if any circumstances change, as this may affect their application.

Any existing children are displayed next to the parent, carer or guardian.
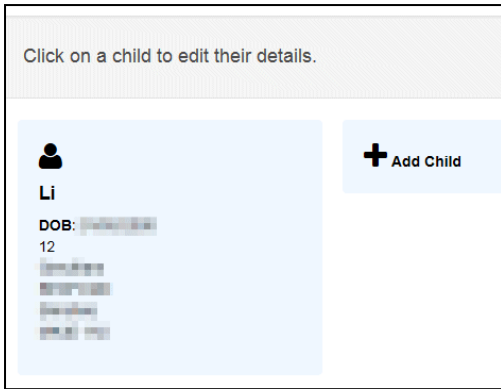
Click on a child to view or edit their details

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 67.

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.

Applications

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

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

Making a Transport Application

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

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

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

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

2. Click the **Apply** button to display the **Step 1 Introduction** page.
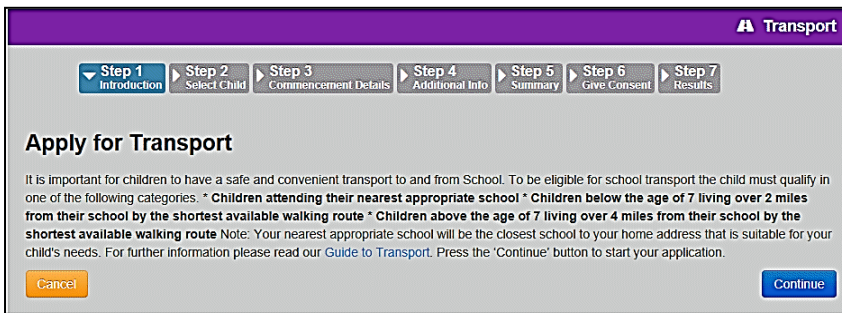
> **NOTE:** *The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks | TRAIntroduction**.*

3. Click the **Continue** button to display the **Step 2 Select Child** page.
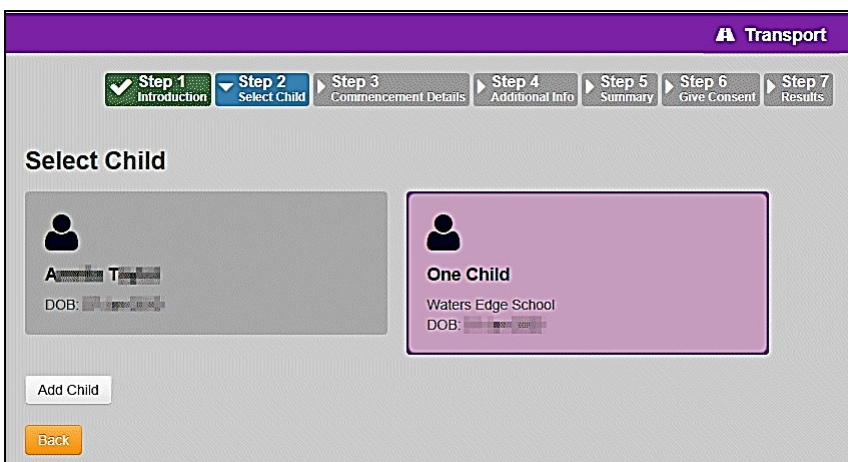
If a required child/dependent is not already listed, click the **Add Child** button, to add them. For more information, see the *Adding a Child* topic.

4. Select a child to display the **Step 3 Commencement Details** page.

5. Enter the transport details.
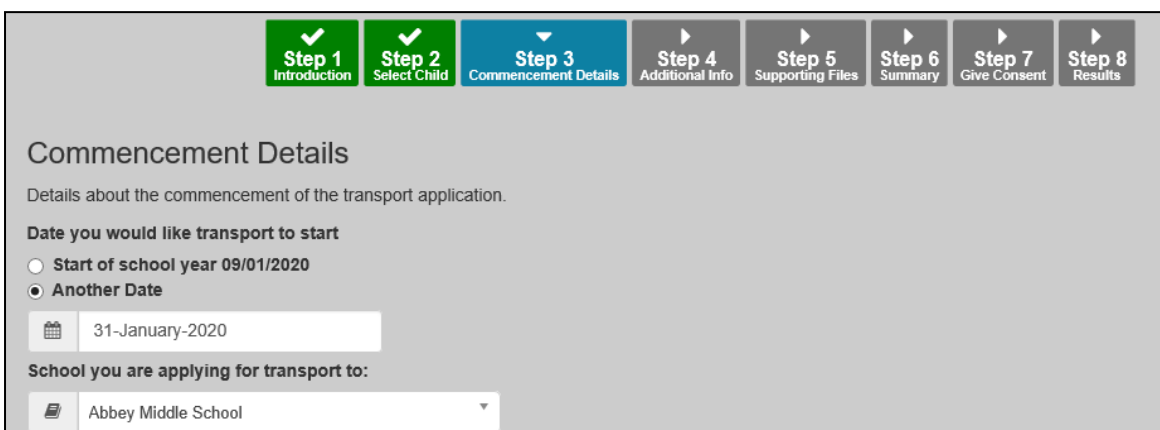
The address that transport is required from is displayed.

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

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

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

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

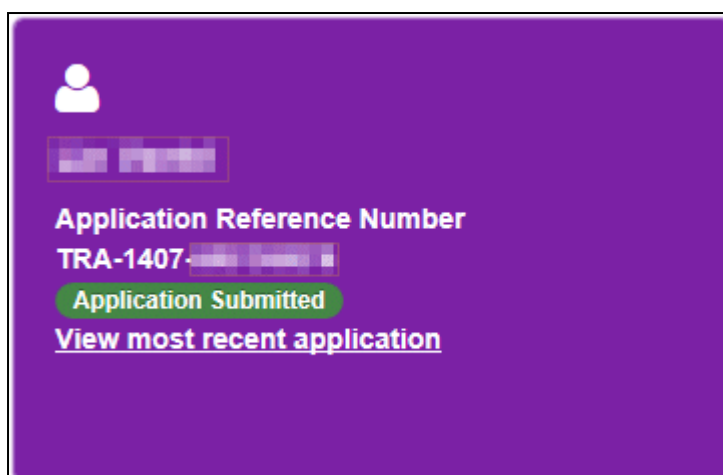8. Click the **Continue** button to display the **Step 4 Additional Info** page.

—

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

Disbursement, SEND and LIF questions are now configurable and will be displayed here. For example:

Additional questions are configured by the local authority via **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | Additional Questions**. For more information, see the *Adding Additional Questions (Transport)* help topic on page *38* and the *Adding Conditional Questions (Transport)* help topic on page *41*.

9. Answer any additional and conditional questions.

10. Click the **Continue** button to display the **Step 5 Supporting Files** page.
    If file uploads have not been activated, skip to step 11.

File uploads are configured by the local authority via **One v4 Online | Citizen Portal Admin | Administration | Transport Administration | File Uploads**. For more information, see the *Configuring File Uploads* help topic on page *49*.

11. Click the **Continue** button to display the **Step 6 Summary** page (if file uploads are activated) or the **Step 5 Summary** page.

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

NOTE: The answer text for the above page is edited via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Text Resources | Transport.** The Yes/No answers and Gender can be set up in Welsh if desired.
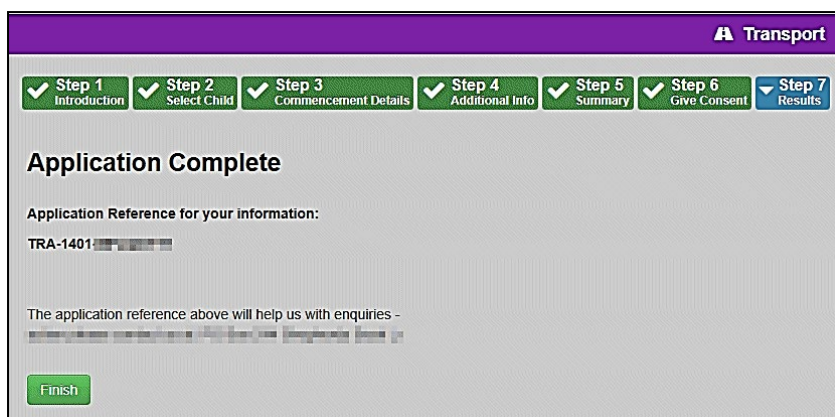
12. Click the **Print this page** button to print the **Application Summary** page.

13. Click the **Continue** button to display the **Step 6 Give Consent** page.

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

14. Select the check box to confirm that you have read and agree to the declaration.

15. Click the **Accept** button to display the **Step 7 Results** page.

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

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

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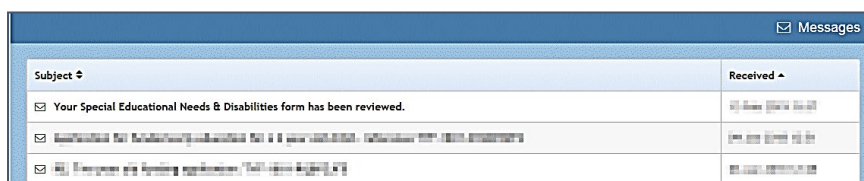
Messages

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

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

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

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

2. Click the individual message to display the contents.

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

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