oneeducation

Free School Meals Administration

last updated for the Summer 2020 (3.72) release

Handbook

CAPITA

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Free School Meals Administration Handbook/Summer 2020 (3.72)/07-07-2020

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Contents

01 | Document Change Control

Date	Release	Description
Summer 2020	3.72	**Free School Meal Settings** New column '**Submit details to Portal Back Office?'** has been added in **FSM Settings**. This allows Local Authorities to choose if the details of a child/carer should be submitted to Portal Back Office or not for matching when FSM application has a **Not Found** or **Error** result. For more information see *Configuring FSM Settings* page *43, Item 7*
		Parents/Carers can claim Free School Meals for a school other than the child's current school, or select a school where the child does not have a current school. See *Making a Free School Meals Application* on page *71, Item 4*.
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 25.
		**Administration	General Administration	Edit Resources** When editing resource descriptions, the Resource Culture now shows EN or CY depending on which tab is selected.
		In order to comply with Welsh regulations, Welsh LAs must provide versions of all pages of their websites in both English and Welsh. For example: https://www.local-authority.gov.uk/**en**/CitizenPortal https://www.local-authority.gov.uk/**cy**/CitizenPortal
		When starting a new registration on Citizen portal, or there is an update to the GDPR, there is an option to change the language selection on the GDPR pop-up to display either English or Welsh so that it can be read in the user's preferred language.
		In Citizen Portal the contrast between foreground and background colors have been checked to ensure they meet WCAG 2 AA contrast ratio thresholds across all pages.
		References to CY-GB will display as CY.

Date	Release	Description
September 2019	3.69.004	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 64 See *Adding a Child* on page 70
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.
		A validation message is displayed when any of the address details are changed 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.

Date	Release	Description
Spring 2019	**3.68**	**Carer Date of Birth** A validation check has been introduced to prevent a Carer from being added that is under 16, e.g. too young to have a National Insurance number For more information, see *Making a Free School Meals Application* on page *71*.
Spring 2019	**3.68**	**Update to Data Protection Consent Statemen**t If an LA updates its Data Protection Consent Statement, an additional dialog is displayed when logging on to the Citizen Portal. For more information, see *GDPR Update* on page *59*.

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

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

03 | **Managing Users**

CSSP Portal Administration

Citizen Self Service Portal Administrator

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

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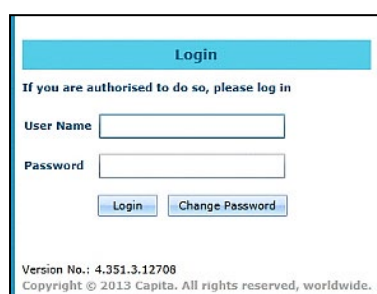 - your LA must have a Citizen Portal licence key.

More Information:

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


Logging in to One v4 Online

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

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

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

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

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

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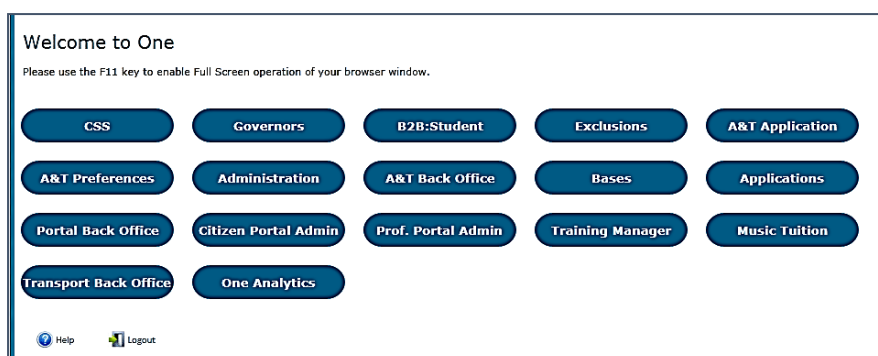
The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

> **More Information:**
>
> *RG_Online_Administration_Login_Logout* available from the One Publications website.

Changing a Password

To change your password in v4 Online:

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

2. On the **Change Password** dialog, enter your **Old Password**.

3. Enter your **New Password**.

4. Enter your new password again in the **Confirm New Password** field.

5. Click the **OK** button.

> **More Information:**
>
> *RG_Online_Administration_Login_Logout* available from the One Publications website.

Forgotten Password

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

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

To reset a password:

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

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

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

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

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

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

5. Enter your new password again in the **Confirm Password** field.

6. Click the **Submit** button. A message confirms that you have successfully changed your password.

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

# Logging in to Citizen Portal Admin

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

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

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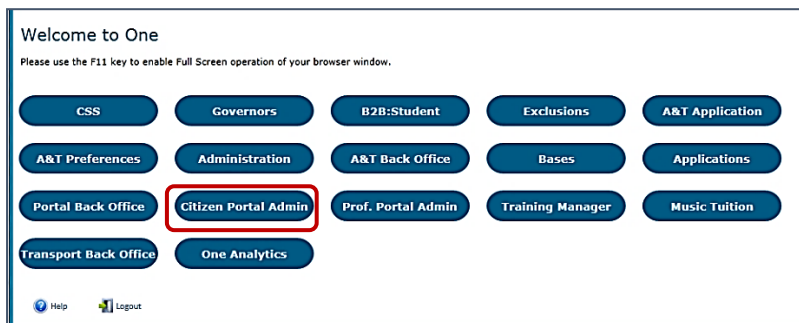
2. Click the **Citizen Portal Admin** button to display the **Announcements** page.
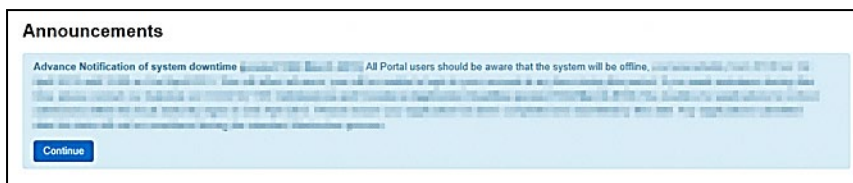
The **Announcements** page displays only if there are announcements regarding the portal.

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

<table>
<tr><td colspan="2">The Announcements page is edited via Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks.</td></tr>
<tr><td colspan="2"></td></tr>
<tr><td>Announcements</td><td>Placeholder_Title</td></tr>
<tr><td>Announcement Start Date</td><td>Placeholder_Forename</td></tr>
<tr><td>Announcements End Date</td><td>Placeholder_Surname</td></tr>
</table>

> **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.
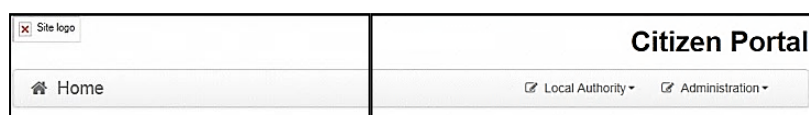
The Citizen Portal Home Page

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

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

- **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 *13*.

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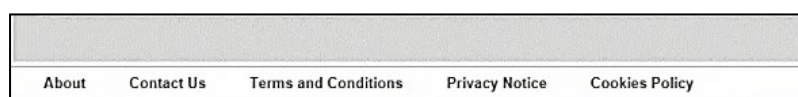
- **About** – displays information about the local authority. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_About**.

- **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:

■ Free School Meals Administration Handbook – the section on *Introduction to FSM Applications*.

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

User Management (Local Authority)

The User Management page enables the administrator to view user details and to change their email address and password.
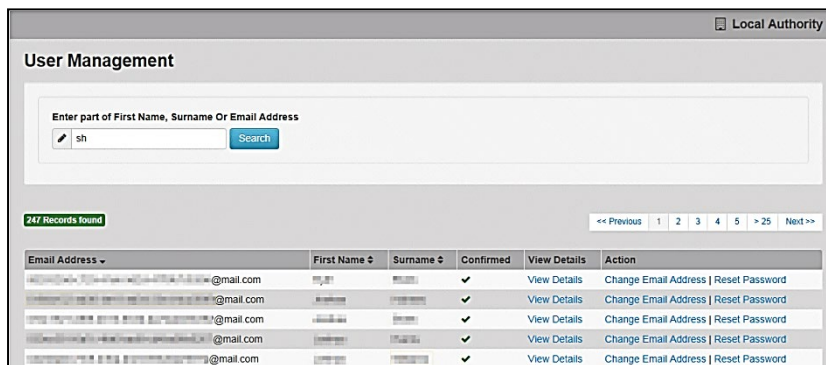
NOTE: If there are any errors reported when changing an email address or password, the record must be changed in One v3.

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**

CSSP General Administration

Introduction to General Administration

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

General Administration

Portal Configuration Configure the general application settings used by the Portal	**Template Management** Create, change, or remove templates used within messages	**Configurable Question Library** Set up and manage a library of questions to be used in One modules	**Edit Resources** Edit site texts and contents
Cache See which data is cached and clear the cache			

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 *19*.
  - *Configuring Application Type Settings* on page *20*.
  - *Configuring Scheduled Task Settings* on page *20*.

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

  - *Template Management* on page *21*.
  - *Creating a Template* on page *21*.
  - *Viewing Templates* on page *23*.
  - *Editing a Template* on page *23*.
  - *Deleting a Template* on page *24*.

- **Configurable Question Library** – set up and manage a library of questions to be used in the One A&T module.

■ **Edit Resources** – edit site texts and contents. For more information, see the following sections:

- *Edit Resources* on page *25*.

- *Editing Resource Descriptions* on page *25*.

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

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:

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:
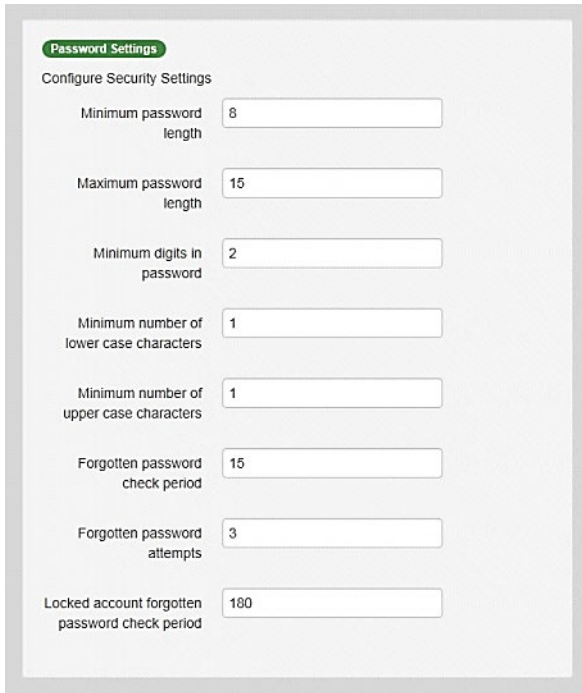
■ Password Settings

■ 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.
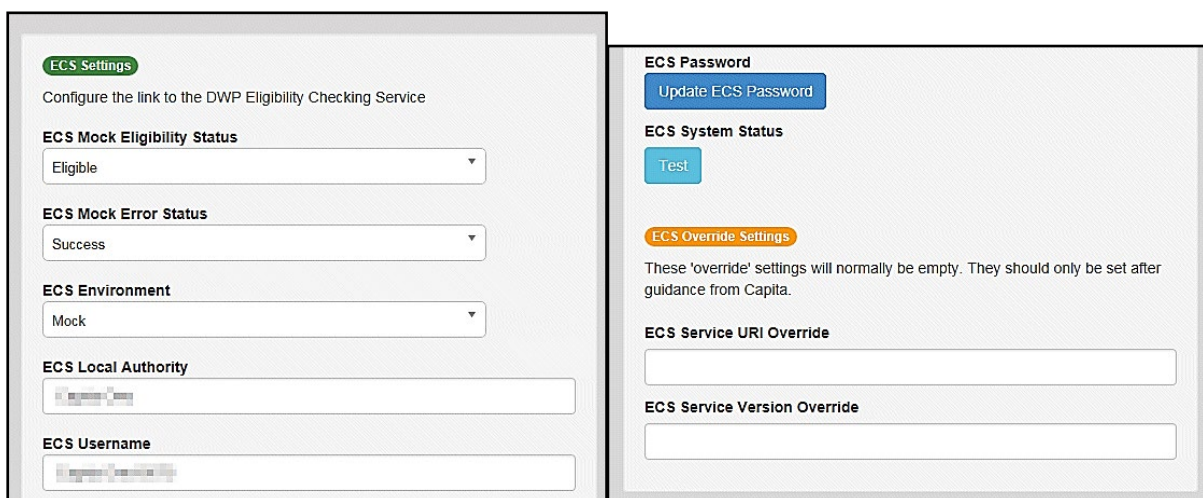
3. Click the **Save** button.

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.

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.
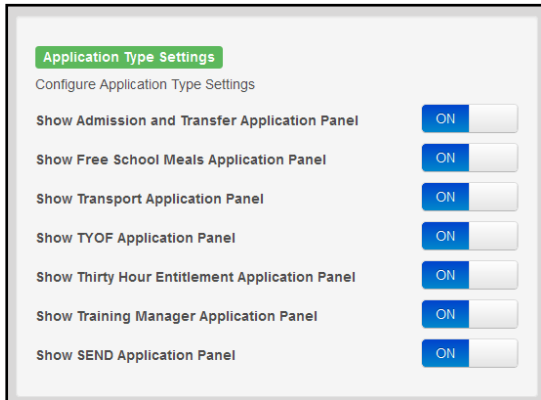
Configuring Application Type Settings

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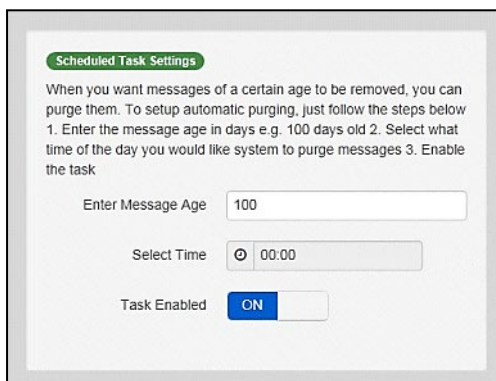
3. Click the **Save** button.

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

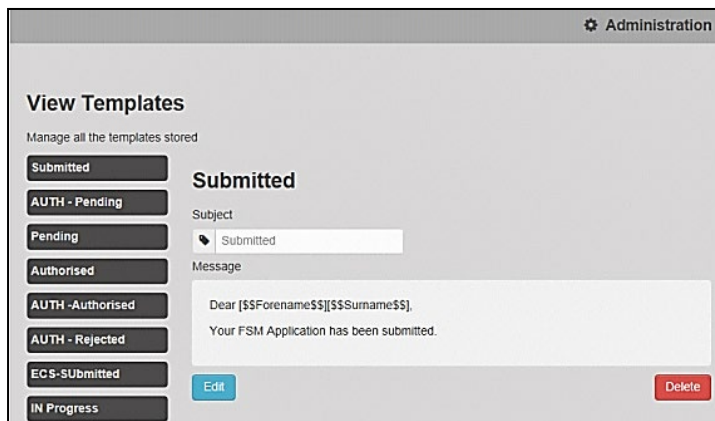# Creating a Template

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.
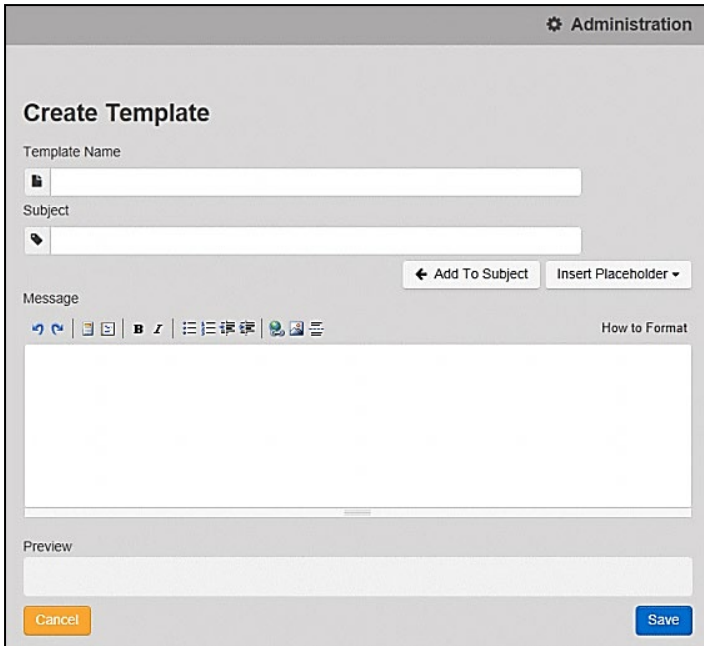
6. Enter your text into the **Message** box. Alternatively click the **Add To Subject** button to change it to **Add To Body**, then choose one of the **Insert Placeholder** options.

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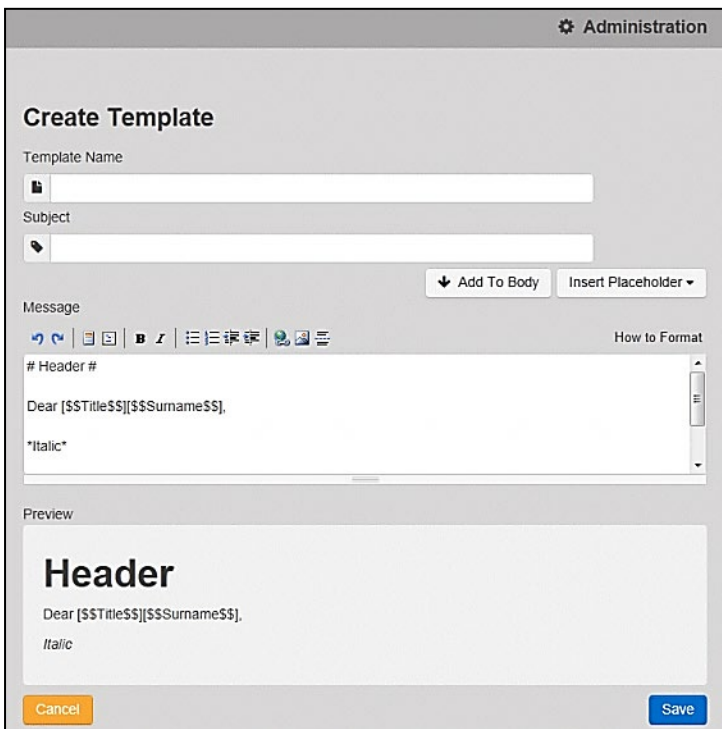
8. Click the **Save** button to close the page and return to the **View Templates** page.

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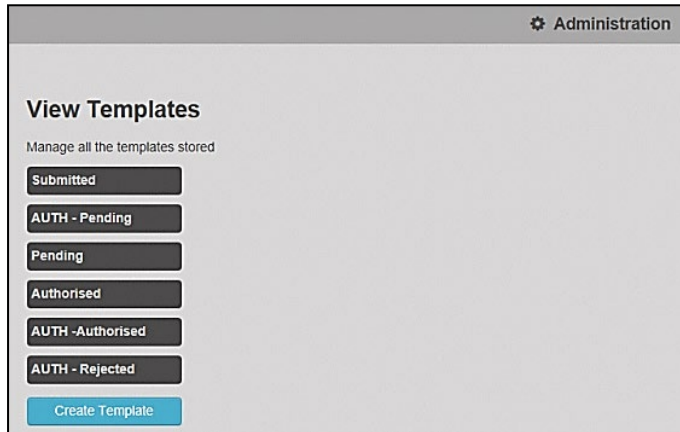
2. Click the template name to display the **Subject** and **Message** that are to be used in the message.

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.

Edit Resources

Edit Resources

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

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

Text Resources

- Account

- Administration

- Admissions

- Citizen Thirty Hours Entitlement

- Consent Resources

- Free School Meals

- Home

- Home Tiles

- Local Authority

- Messaging

- SEND

- Shared

- Training Manager

- Transport

- Two Year Old Funding.

Markdown

- Text Blocks

To find a particular resource description, open one of the **Resource Configuration Descriptions** then use the **Ctrl + F** keys on your keyboard to display the **Find** dialog. The entered text is highlighted on the page.
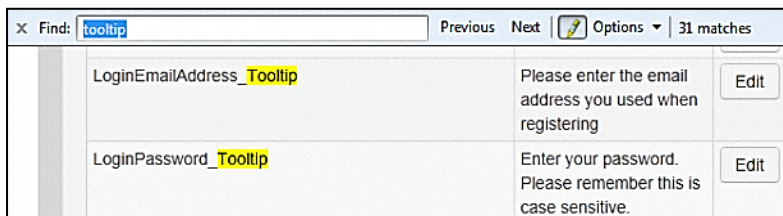
> **NOTE:** *You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.*

Editing Resource Descriptions

The resource descriptions are individual dialogs that enable you to manage the text that is available to users in many areas of the Citizen Self Service portal. If a **Resource Value** is

changed via the **Edit Resource Title** dialog, then the next time a user sees that resource, the text will be updated to reflect the change.

To edit the resource descriptions:

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

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

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

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

The following fields are read-only:

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

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

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

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

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

    ### Site Logo and Header text

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

    To edit the resource descriptions:

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

Resource Configuration Title
Resource Configuration description
Administration ▼
Clear resources cache

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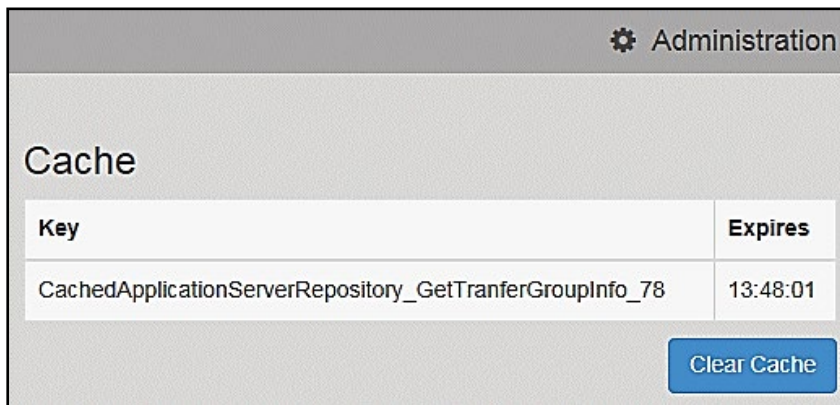
2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.
3. Click the **Save** button.

05 | GDPR

Introduction to GDPR

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**.
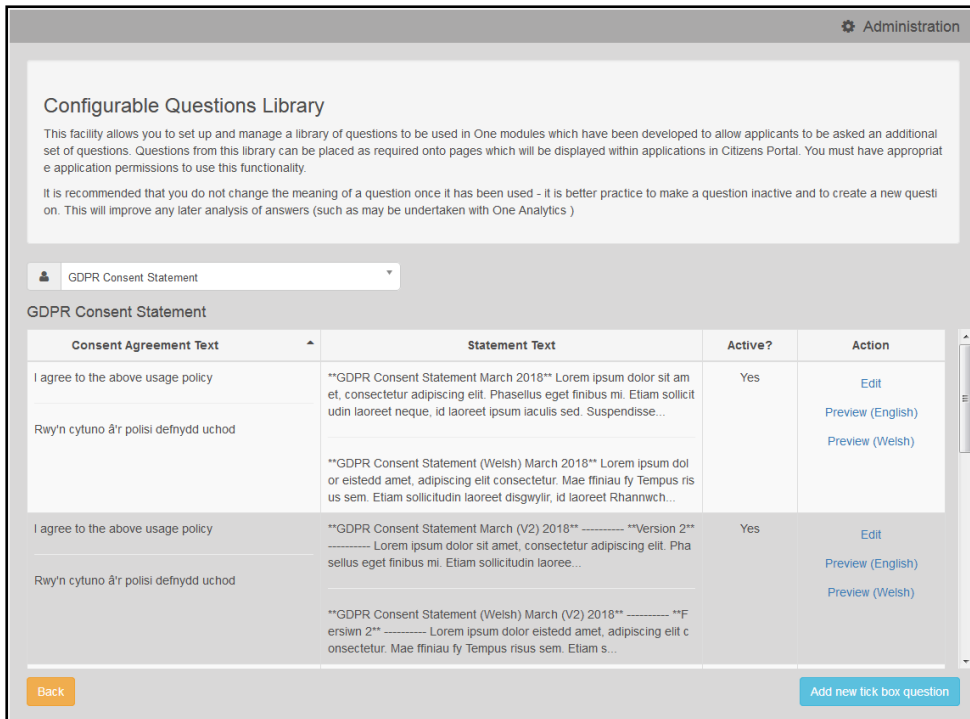
Adding a New Question

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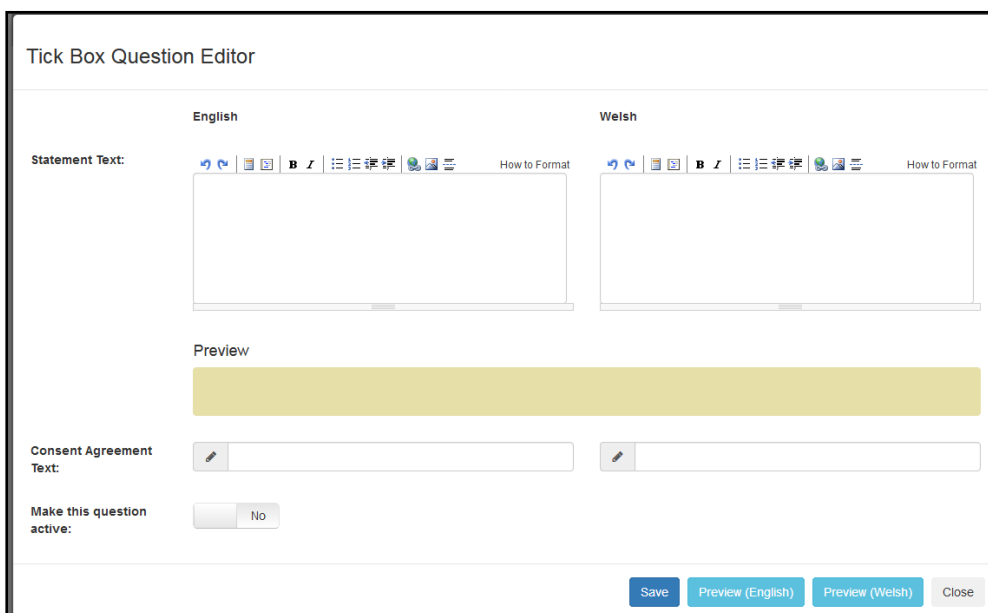
4. Enter the **Statement Text** (in either English or Welsh). This text is presented to the Citizen portal user and comprises the Consent Statement.

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.

Free School Meals Administration Handbook

06 | **Free School Meals Administration**

Introduction to Free School Meals Administration

Access to the **Free School Meals Administration** page is via **v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**.
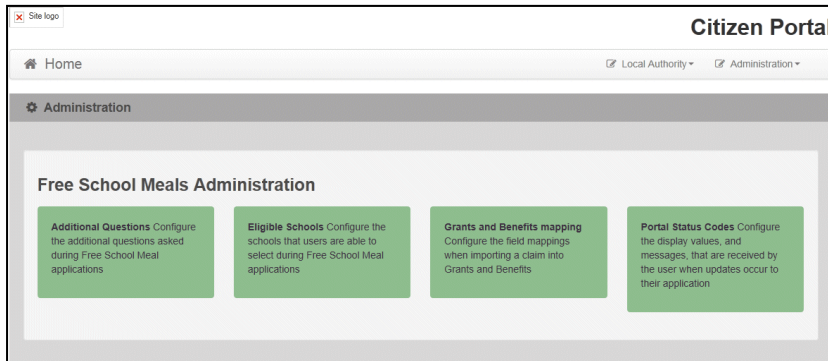
Parents, guardians and carers can apply for free school meals, with instant feedback as to their eligibility from the **Eligibility Checking Service**. Applications are loaded into the **Grants & Benefits** module for processing and batch checking.

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

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

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

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

- **Additional Questions** – configure the additional questions asked during Free School Meal applications.

- **Eligible Schools** – configure the schools that users are able to select during Free School Meal applications.

- **Grants and Benefits Mapping** – configure the field mappings when importing a claim into Grants & Benefits.

- **Portal Status Codes** – configure the display values and messages that are received by the user when updates occur to their application.

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

Creating a Dummy Base (FSM)

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

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

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

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

Configuring FSM Applications

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

- **Additional Questions**. For more information, see *Adding Additional Questions (FSM)* on page *40*.
- **Eligible Schools**. For more information, see *Configuring Eligible Schools (FSM)* on page *41*.
- **Grants and Benefits Mappings**. For more information, see *Configuring Grants and Benefits Mappings* on page *43*.
- **Portal Status Codes**. For more information, see *Configuring Portal Status Codes* on page *46*.
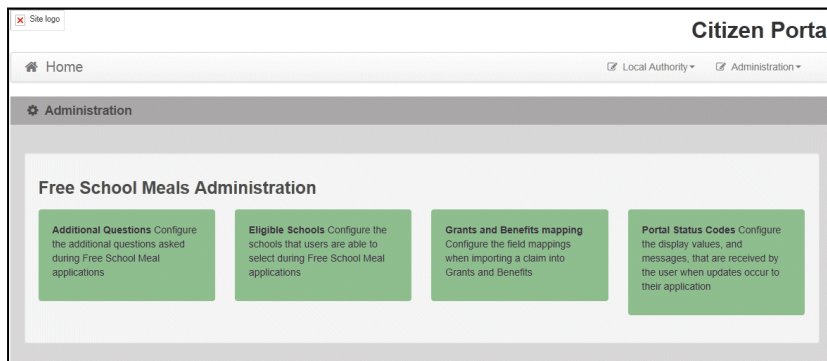
Adding Additional Questions (FSM)

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

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

To configure additional questions:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**.

2. Click the **Additional Questions** button to display the **Setup Additional Questions** page; existing questions are displayed in number order.

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

4. Select an **Answer Type**. If you select the **Dropdown list** option, the **Lookup for drop down list** field is displayed. Enter the Table_ID from One **v4 Client | Tools | Administration | Lookups**.

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

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

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

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

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

Editing an Existing Additional Question

To edit an existing additional question:

1. Select **One v4 Online \| Citizen Portal Admin \| Home \| Administration \| Free School Meals Administration**.

2. Click the **Additional Questions** button to display the **Setup Additional Questions** page; existing questions are displayed in number order.

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

4. Make the required changes; all of the fields can be edited.

5. Click the **Complete** button.

Configuring Eligible Schools (FSM)

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

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

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

To configure the eligible schools:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**.

2. Click the **Eligible Schools** button to display the **Configure FSM Schools** page.

3. To add a base group to the supported list, highlight the base group, then click the **Add** button to move it to the **FSM supported Base Groups** list.

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

5. Click the **Save** button.

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

   When the parent, carer or guardian makes a Free School Meals application, they will see if their application is eligible as **Step 6 Eligibility Results**.
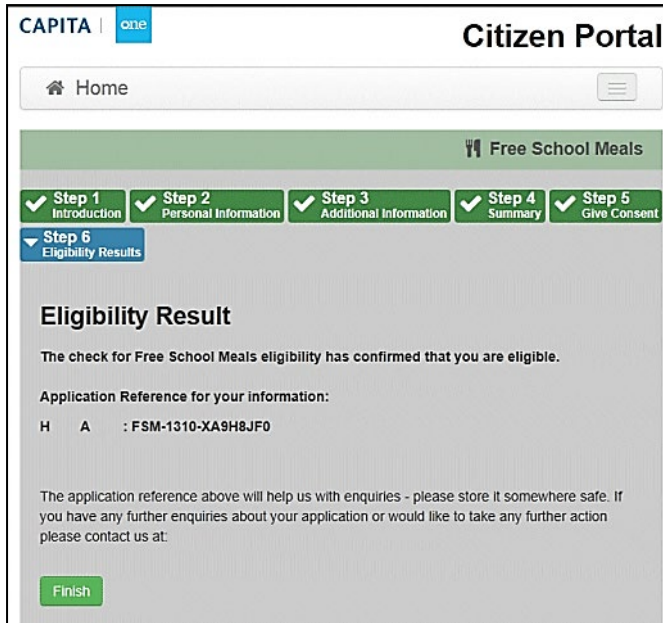
The text for the above page is edited via **General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks**.	
Eligibility Result heading	EligibilityResult
The check for……	EligibleFSM
Application Reference for…..	ApplicationReferenceText
The application reference……	EligibilityStatusFurtherInformation
Invalid Eligibility Result heading	InvalidEligibilityResults
The check for…(not eligible)	EligibleNotFound

Removing Base Groups

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

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration | Eligible School**s to display the **Configure FSM Schools** page.
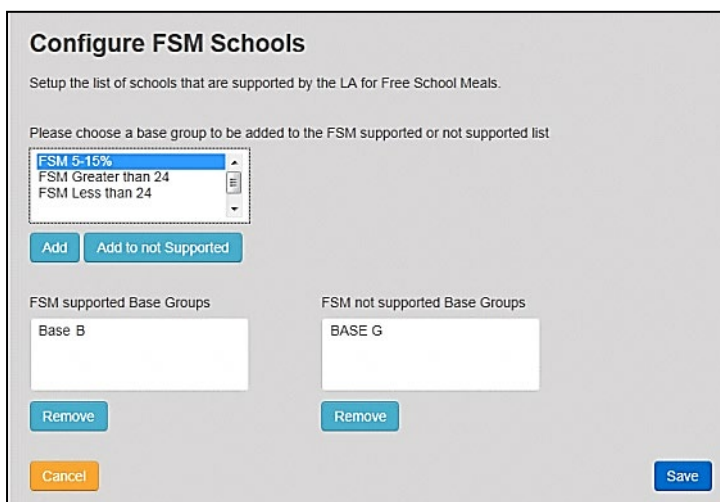
2. To remove a base group from the supported base group list, highlight the base group then click the **Remove** button to move the base group to the base group chooser list.

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

4. Click the **Save** button.

Configuring Grants and Benefits Mappings

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

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

There are two types of configuration:

■ **FSM Settings** – configuration of results from the DWP Eligibility Check.

■ **Exception Settings** – configuration of a claim status to be used when loading the claim into One, when an exception occurs.

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

Configuring FSM Settings

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

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

■ Eligible

■ Not Found

■ Error.

To configure the **FSM Settings**:

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

FSM Settings	Exception Settings						

FSM Settings

Eligibility Checking Outcomes	Category	Item	Active Fund	Use Default Fund Dates	Claim Status	Authorisation Status	Submit details to Portal Back Office?
Eligible	Free School Meals	General Free School Meal	FSMACC	Yes	Draft Application	Authorised	Yes
Not Found	Free School Meals	General Free School Meal	FSMACC	Yes	Current	Authorised	No
Error	Free School Meals	General Free School Meal	FSMACC	Yes	Current	Authorised	Yes

Cancel   Save

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

2. For the required **Eligibility Checking Outcome**, select **Free School Meals** from the **Category** drop-down.

3. Select **General Free School Meals** from the **Item** drop-down.

   The **Active Fund** field defaults to **FSMACC**.

4. Select the **Use Default Fund Dates** option.

5. Select a **Claim Status**. The **Claim Status** options are populated via **v4 Client | Tools | Administration | Lookup Codes | Table_ID 0312**.

6. Select the **Authorisation Status**. These are system generated codes and cannot be edited.

7. **Submit details to Portal Back Office?.** This column allows a Child's details to be submitted to Portal Back Office in accordance to selection made.

   The behaviour of selecting **Yes** /**No** in this column for each **Eligibility Checking Outcome** is as follow:

   - **Eligible:** This option is set to **YES** by default and cannot be changed to **No**. The child/carer details will always be submitted to Portal Back Office for matching. The application will appear in **G&B applications** after matching process is complete.

   - **Not Found**: This option can be selected as **Yes** or **No**.

     If **Yes** is selected and an FSM Application is Not Found for a Child, the child /carer's details will still be submitted to Portal Back Office for matching.

   - **Error:** This option can be selected as Yes or No.

     If **Yes** is selected and an error appears on the **Declaration Form**, the child /carer's details will still be submitted to Portal Back Office for matching. The Application will still be accessible on the Portal for completion.

   If the **Claim Status** is selected as **Pending** for each eligibility checking outcome, then each field will default to **Yes** and cannot be changed.

8. Click the **Save** button.

9. Repeat steps 2 through 7 for the other **Eligibility Checking Outcomes**.

Configuring Exception Settings

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

- A current FSM Claim already exists for the student in One.

- The National Insurance number of the applicant is different to that of the matched parent, carer or guardian in One.

- The National Insurance number of the applicant already exists for another person in One.

- The Asylum Seekers number of the applicant is different to that of the matched parent, carer or guardian in One.

- The date of birth of the applicant is different to that of the matched parent, carer or guardian in One.

- The current school of the child on the application is different from the current school of the matched student in One.

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

To configure the **Exception Settings**:

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

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

---

2. For each of the **Exception scenarios**, select a **Claim Status**. **Claim Status** is populated via **v4 Client | Tools | Administration | Lookup Codes | Table_ID 0312**.

3. Click the **Save** button.

Configuring Portal Status Codes

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

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

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

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

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

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

- Authorised
- Pending
- Rejected.

Maintaining Status Codes

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

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

- Incomplete
- Submitted
- Received.

Incomplete

An **Incomplete** status signifies that the application is currently in progress on the Citizen Self Service portal.
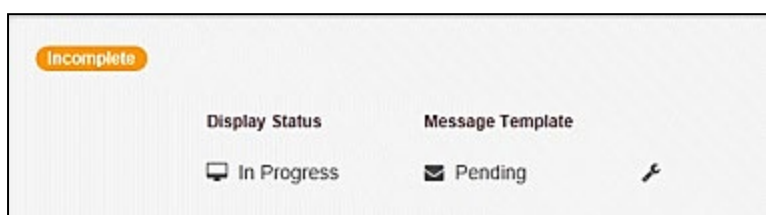
It is not possible to add additional rows to the **Incomplete** panel. The **Display Status** and **Message Template** can be changed by highlighting the row and selecting one of the fields to display the **Maintain Status Codes** dialog.

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

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

Submitted

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

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

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

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

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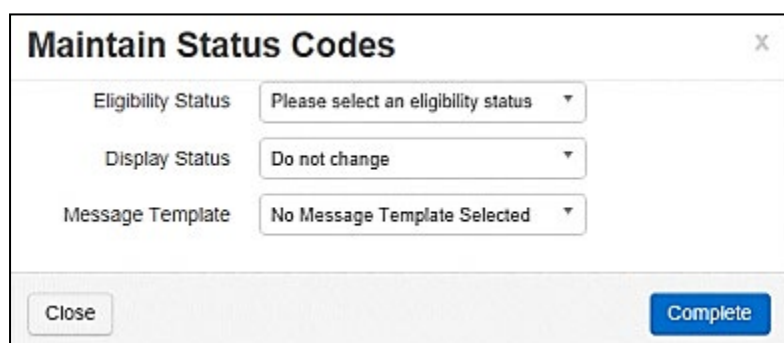
Adding a New Eligibility Status

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

- Eligible

- Not Found

- Error.

To add a new Eligibility Status:

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free Schools Administration | Portal Status Codes** to display the **Maintain Status Codes** page.

2. For each of the **Eligibility Status** options, click the **Add New Eligibility Status** button on the **Submitted** panel to display a new **Maintain Status Codes** dialog

3. Select an **Eligibility Status**.

4. Select a **Display Status**.

5. Select a **Message Template**.

6. Click the **Complete** button.

7. Repeat steps 2 through 7for the other **Eligibility Status** options.

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

Received

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

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

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

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

Maintaining Grants and Benefits Claim Codes

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

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

- Authorised
- Pending
- Rejected.

Adding a New Claim Status

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

1. Select **One v4 Online | Citizen Portal Admin | Home | Administration | Free Schools Administration | Portal Status Codes** to display the **Maintain Status Codes** page.

2. In the panel for the required claim status code (Authorised, Pending or Rejected), click the **Add New Claim Status** button to display the **Maintain Status Codes** dialog.

3. Select a **Claim Status Code**.

4. Select a **Display Status**.

5. Select a **Message Template**.

6. Click the **Complete** button to save the record

7. Repeat steps 2 through 6 for the other Status Codes.

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

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

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

Editing a Claim Status

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

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

2. Select the required options from the drop-downs; all of the fields can be edited.

3. Click the **Complete** button to save the changes.

4. Repeat steps 1 through 3 for the other **Status Codes**.

07 | **Applications FSM**

Introduction to FSM Applications

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

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

Free School Meals Applications

When a Free School Meals application is made via the Citizen Self Service portal, any child that has either not been successfully matched to a student in One, or that has been successfully matched, but there are differences (conflicts) between some details of the incoming child and the matched student, is processed via v**4 Online | Portal Back Office | Data Transfer**. The incoming students are listed under the FSM Dummy Base.

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

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

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

Managing FSM Applications

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

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

Searching for a FSM Application

To search for a Free School Meals application:

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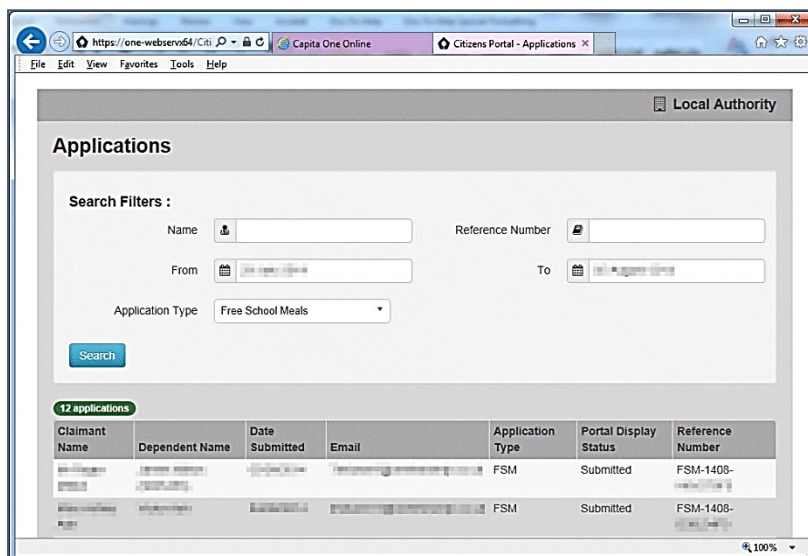
The list of applications, and the total number, display in the browse below the **Search Filters** panel.

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

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

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

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

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

   - **Application Type** – click the drop-down and select **Free School Meals**.

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

Reviewing FSM Applications

To review Free School Meals applications:

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

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

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

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

- **Application Details**
  - Application Reference Number
  - Current Status.
- **Children**
  - Name of Child
  - Gender
  - Date of Birth
  - Current School
  - Claimant's Relationship to Child
  - Parental Responsibility
  - One Student ID.
- **Additional Information**
  - Additional Free School Meals. For more information, see *Adding Additional Questions (FSM)* on page *39.*

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

08 | **Making Applications**

CSSP 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 *69*.

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

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

- **Personal Details**

- **Contact Details**

- **Change Email Address**

- **Change Password**

- **Change 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.

> **More Information:**
>
> For more information, *Home | Administration Page* refer to on page *12*
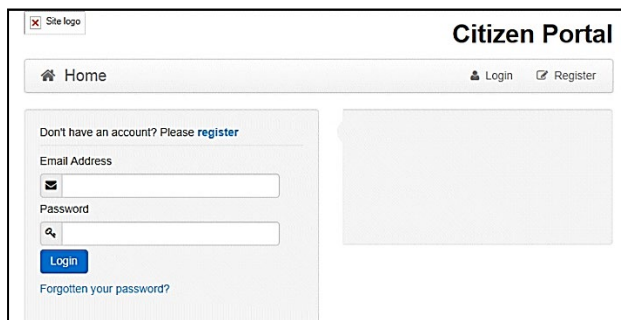
Creating an Account

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. For more information, see *Update Data Protection Consent Statement* on page *59*.

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

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

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

GDPR Update

Update Data Protection Consent Statement

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

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

Two Step Verification

Enabling Two Step Verification

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

The <u>first time</u> you log onto the Citizen Portal you are given the option to enable the two step verification process. If you try to log onto SEND without enabling the two step verification process, the following message is displayed:
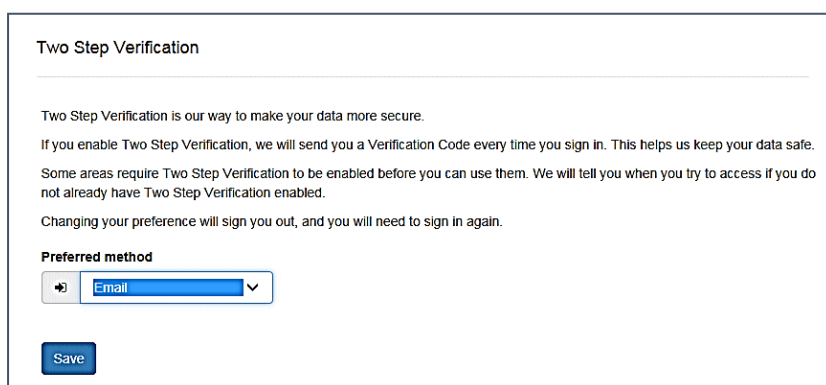
> This area requires Two Step Verification to be enabled before you can access it.
> Please enable this in My Account before continuing.

To set up two step verification:

1. Log onto the One Citizen Self Service portal using the email address and password you used to register.

2. Click the **Login** button to display the **Enable Two Step Verification now** dialog. This dialog is only available for a few seconds. If it disappears, the two step verification process can be enabled via **My Account | Two Step Verification**.

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

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

5. Click the **Save** button.

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

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

7. Locate the email containing your verification code.

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

9. Click the **Verify** button.

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

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

Disabling Two Step Verification

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

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

To disable two step verification in a different module:

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

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

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

4. Click the **Save** button.

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

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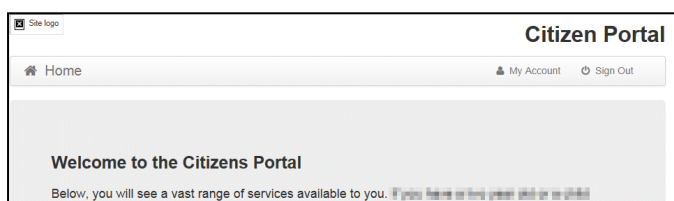
The **Home** page displays the following services that are available to the parent, carer, guardian or young person:

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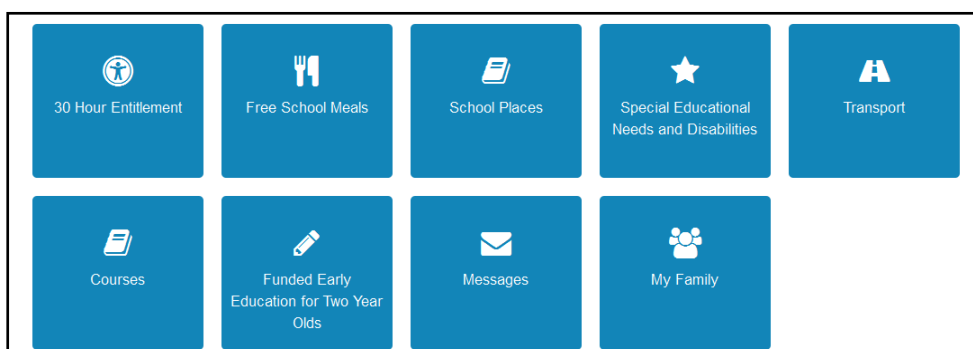
From here, the Citizen portal user can manage their account, check the validity of extended entitlement codes, make applications for school places, free school meals, transport, courses, funded early education for two year olds and complete special educational needs and disabilities forms. They can also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

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

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

- **Personal Details**
- **Contact Details**
- **Change Email Address**
- **Change Password**
- **Change of Circumstances**
- **Two Step Verification**

- **Consent History**

- **Withdraw Consent.**

For more information, see *My Account* on page *63*.

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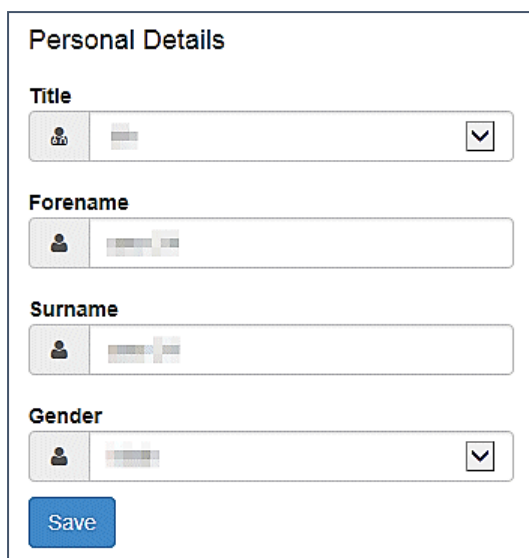
- Personal Details
- Contact Details
- Change Email Address
- Change Password
- Change of Circumstances
- Two Step Verification
- Consent History
- Withdraw Consent.

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.
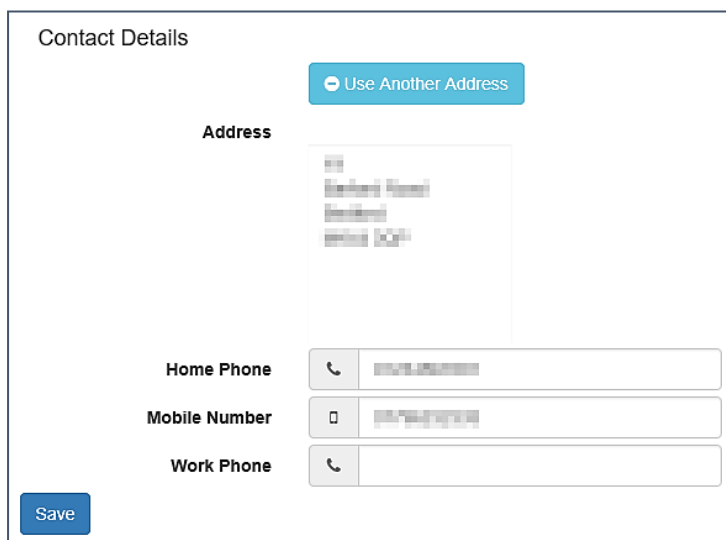
5. Click the **Save** button.

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.

7. Click the **Submit** button.

Change Password

To change your password:

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

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

3. Select **Change Password**.

4. Enter your **Current Password**.

   Use the **Show** button to view your password as you type.

5. Enter your **New Password**.

   Use the **Show** button to view your new password to confirm it matches your previous password..

6. Click the **Submit** button.

Change of Circumstances

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

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

3. Select **Change of Circumstances**.

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

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

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

Two Step Verification

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

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

Enabling Two Step Verification

To set up two step verification:

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

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

3. **Select Two Step Verification**.

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

5. Click the **Save** button.

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

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

7. Locate the email containing your verification code.

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

9. Click the **Verify** button.

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

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

Disabling Two Step Verification

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

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

To disable two step verification:

1. Select **My Account | Two Step Verification** to display the **Two Step Verification** page.
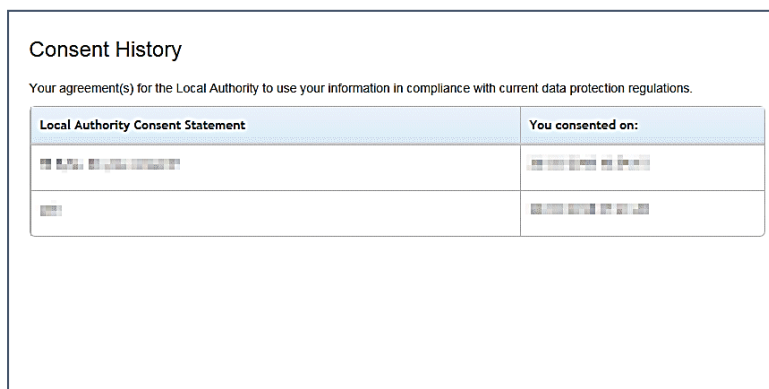
2. Select **No Two Step Verification** from the **Preferred method** drop-down.

3. Click the **Save** button.

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

Consent History

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

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

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

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

This is a read-only page.

Withdraw Consent

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

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

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

3. Select **Withdraw Consent** to display the **Withdraw Consent** page.
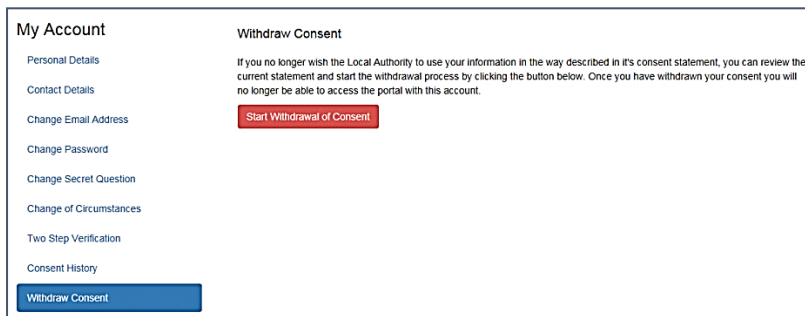
4. Click the **Start Withdrawal of Consent** button to display the **Data Protection** dialog.

5. The dialog displays the consent statement alongside the following message:

   You have previously agreed to the authority's most recent Data Protection Consent Statement.
   If you wish to withdraw your consent, click the withdraw button below.

6. Click the **Withdraw my consent** button to display the **Decline** dialog.

   This is a final warning that once you have withdrawn your consent for the LA to use your information, you will not be able to access your Citizen Portal account.

7. If you do wish to withdraw your consent, click the **Withdraw my consent** button. The following message is displayed:

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

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

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

My Family

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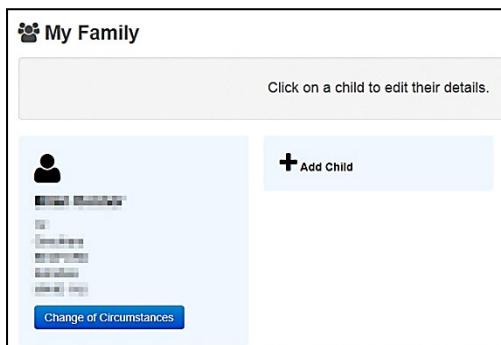
Clicking the **Change of Circumstances** button displays a message from the local authority to contact them if any circumstances change, as this may affect their application.

Any existing children are displayed next to the parent, carer or guardian.
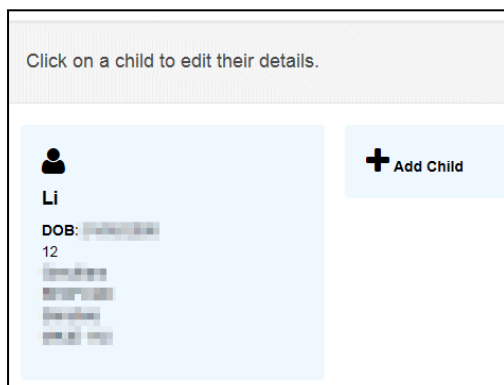
Click on a child to view or edit their details
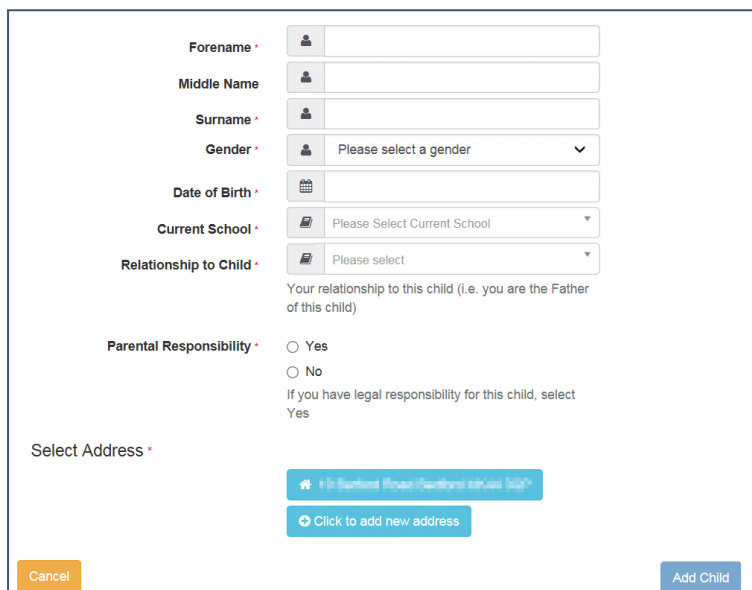
Click the **Add Child** button to add another child to the family's application.

*For more information, refer to *

Adding a Child

To add a child to a parent's account:

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

2. Enter the required information about the child.

    a. If the child's address is listed, then select the address.

    b. If the child lives elsewhere, select the **Click to add new address** button to display the **Find Address** dialog.

        i. Enter the full **Postcode** and click **Search** to display the list of addresses matching your postcode.

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.*

FSM Applications

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

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

Making a Free School Meals Application

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

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

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

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

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

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

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

> *Note: A validation check has been introduced to prevent a Carer from being added that is under 16 e.g. too young to have a National Insurance Number and therefore too young to be assessed for entitlement to a free school meal.*

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

If you wish to claim Free School Meals for a school other than you child's current school, or your child does not have a current school, select a school from the **Please select a school** drop-down menu.

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

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

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

Additional questions are entered by the local authority via **One v4 Online | Citizen Portal Admin | Home | Administration | Free School Meals Administration**. For more information, see *Adding Additional Questions (FSM)* on page *39*.

6. Answer any additional questions.

7. Click the **Continue** button to display the **Step 4 Summary** page.

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

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

8. Click the **Print this page** button to print the **Application Summary** page.

9. Click the **Continue** button to display the **Step 5 Give Consent** page.

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

---

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

11. Click the **Accept** button to display the **Step 6 Eligibility Results** page.

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

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

---

12. Click the **Finish** button to return to the **Home** page. The Free School Meals application is displayed.

Application Reference Number
FSM-1901-2T8C6VF2

<u>View most recent application</u>

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

Interpreting the Qualifier Codes

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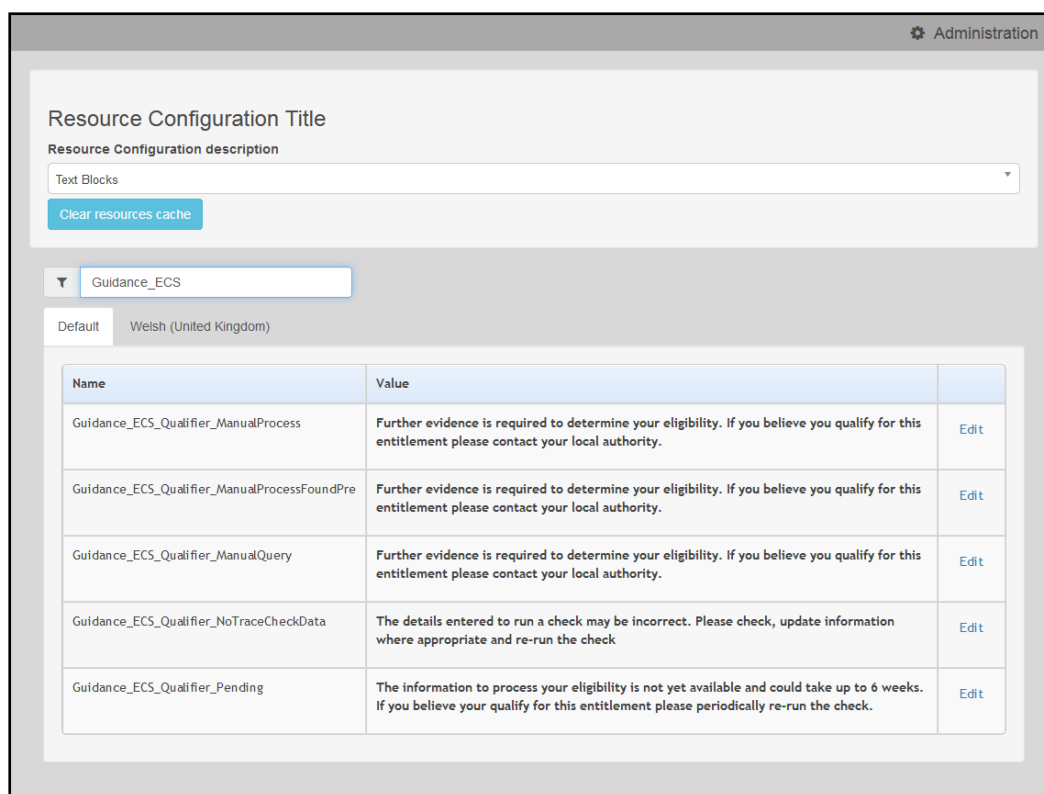
The following table shows how the qualifier is interpreted:

Qualifier	Interpretation
Final	The check result stands and no further action is required.
Pending	The information to process the check is not yet available and could take up to 6 weeks. The check should be periodically re-run.
No Trace	Details entered may be incorrect. The parent should re-enter their details.
Manual Process	The parent should provide further evidence and the LA should raise a manual query on the ECS web portal.
Manual Query	

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

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.
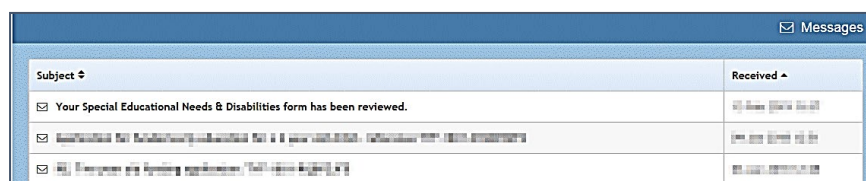
2. Click the individual message to display the contents.

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

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