



Managing Grants and Benefits Handbook

last updated for the Summer 2020 release 3.72

Handbook

CAPITA

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Managing Grants and Benefits Handbook/Summer 2020 Release 3.72/15-07-2020

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01 | Document Change Control

Date	Release	Description
Summer 2020	3.72	<p>Free School Meal Settings</p> <p>New column 'Submit details to Portal Back Office?' has been added in FSM Settings. This allows Local Authorities to configure if the details of a child/carers should be submitted to Portal Back Office or not for matching when FSM application has a Not Found or Error result.</p> <p>For more information see Configuring FSM Settings page 62 Item 7</p>
Spring 2018	3.65	<p>The handbook has been updated for the Spring 2018 Service Pack 1 as follows:</p> <ul style="list-style-type: none"> • When the result of an individual ECS check is Not Found, a qualifier code is also returned. This is interpreted and displayed on the eligibility result screen. For more information, see Eligibility Checking Service (ECS) Validation for Individual Applicants on page 61. • When an ECS Batch validation check is carried out and the result is Not Found, a qualifier is returned and stored on the individual check record. For more information, see Eligibility Checking Service (ECS) Validation for Multiple Applications on page 62. • The ECS History window includes a new column to display the qualifier where a Not found result is received. For more information, see Viewing Parent/Carer Eligibility Checking Service (ECS) History on page 62.

02 | Introduction to Grants and Benefits

Overview of Grants and Benefits

Grants and Benefits (G&B) is a separately licensed part of the Applications module within One v4 Online.

G&B records and maintains funding claim applications raised by parents, carers or students. It can maintain the payments, dependent details, benefits lists and fund details for the records it creates.

Generally, applications for funding is in the form of Free School Meals (FSM), but can also cover other funding that may be available from the government and managed by the LA.

After a G&B application is approved, the details are incorporated into the relevant areas of One.

Using this Handbook

This handbook is intended for One administrators and users of the G&B area. The first chapter of this handbook covers the configuration of G&B and the rest of the handbook covers day-to-day usage of the software.

Permissions

G&B uses business processes to determine the user groups that have access to specific functionality. User groups are assigned Read, Read-Write, Read-Write-Delete or Deny permissions to each G&B business process. Permissions are maintained in the One v4 Client. The following table outlines the permissions required to access specific areas of the G&B software in v4 Online.

Main Business Process	Business Process	Read	Read-Write	Read-Write-Delete	Deny
GNB				✓	
	Bank Details		✓	N/A	
	Grants and Benefits			✓	
Bases	Permissions for these main business processes can be set to whatever the required level is for the selected user group, however they <u>cannot</u> be set to Deny.				
Student Data					
Person Administration					

IMPORTANT NOTES:

The Bank Details business process only affects local authorities in Northern Ireland. Local authorities with a different locale will see no change to system behaviour, regardless of the access assigned to this business process.

After setting G&B permissions, One sets permissions for the CIEE main business process automatically. This occurs even if your site does not have a CIEE licence. The permissions set for the CIEE main business process are not sufficient to administer CIEE, and additional permissions are required for groups that will also administer CIEE.

More Information:

RG_Permissions reference guide available from the [One Publications](#) website.

03 | Setting Up and Administering Grants and Benefits

Introduction

The **Administration** area of Grants and Benefits (G&B) enables you to configure how the software works as well as maintain categories, agencies, eligibility checks and claim serial numbers.

Setting Up Grants and Benefits Checklist

In order to process grant and benefit claims, a One system administrator must set up the system. For most customers, the settings are maintained when migrating from One v3 to the One v4 Online version of G&B.

Complete the following checklist to configure Grants and Benefits:

- For customers not migrating an existing instance of Grants and Benefits from v3, create a NASS UDF. For more information, see [Setting Up a National Asylum UDF](#) on page 7.
- Add new claim definitions categories via the **Administration | G&B | Claim Definition** tab. For more information, see [Maintaining Claim Categories](#) on page 7.
- Set up item defaults that are entered automatically when a specific item is added to a claim via the **Administration | G&B | Claim Definition** tab. For more information, see [Managing Item Defaults](#) on page 14.
- Configure module-wide behaviours via the **Administration | G&B | Module Behaviour** tab. For more information, see [Editing the Module Behaviour Options](#) on page 29.
- Define user defaults that can be applied to each new claim via the **Administration | G&B | User Defaults** tab. For more information, see [Editing the User Defaults Options](#) on page 30.
- Add agencies via the **Administration | G&B | Manage Agencies** tab. For more information, see [Managing Agencies](#) on page 25.
- Define serial numbers for claims via the **Administration | G&B | Fund Serial Number** tab. For more information, see [Configuring Serial Numbering](#) on page 31.

Setting Up a National Asylum UDF

A User Defined Field (UDF) with the name NASS is required for G&B to process applications that use a National Asylum Support Service (NASS) number instead of a National Insurance (NI) number. For Local Authorities that are migrating an existing instance of G&B from One v3, the required UDF is created automatically during the migration process. For customers that never used G&B in the v3 Client, a new UDF should be created with the name NASS, using the v4 Client. For more information on creating UDFs, please refer to the *RG_Administration_Managing_UDFs* document, available from the [One Publications](#) website.

Maintaining Claim Categories

All applications must be associated with a claim category. Although G&B provides a wide range of pre-defined claim categories, you can edit existing categories and add new ones to meet your requirements. After creating a claim category, you must then add individual items to the category.

Claims can have either a single or multiple **Issue Type**. If a category has an **Issue Type** of **Single**, an applicant can have only one active claim (regardless of authorisation status) for that category at any time; i.e. the start and end dates for each claim cannot overlap. You can create a claim with a start date in the future if there is currently no active claim. An **Issue Type** of **Multiple** means that a person can have multiple active claims for the category at the same time.

More Information:

- [Adding a Claim Category](#) on page 8
- [Managing Item Defaults](#) on page 14
- [Setting Active Status for Categories and Items](#) on page 20
- [Adding Items to a Category](#) on page 11

Adding a Claim Category

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is selected.

The screenshot shows the 'Administration' section of the system, specifically the 'G&B' (Grants and Benefits) area. The 'Claim Definition' tab is selected. The 'Category Details' section shows the following information:

- Category : CLO - Clothing Grants
- Issue Type: Single
- Is FSM: No
- Active : Yes
- Show only Active Categories and Items

Below this information are two tables:

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Below the tables is the 'Items Defaults' section, which includes a table with the following data:

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. Click the **Add** hyperlink in the **Category Details** section to display editable fields relating to category details.

The screenshot shows the 'Category Details' form with the following fields and options:

- Category Code**: Input field with a dropdown arrow.
- Category Description**: Input field with a dropdown arrow.
- Issue Type**: Radio buttons for **Single** and **Multiple**. The **Multiple** option is selected.
- Is FSM**: A checkbox that is currently unchecked.
- Active**: A checkbox that is checked.
- Buttons**: **Cancel** and **Save** buttons.

4. Enter a **Category Code**.
5. Enter a **Category Description**.
6. Select the required **Issue Type** radio button.

- If required, select the **Is FSM** check box.

NOTE: If you do not want the category to be immediately available to users, deselect the **Active** check box.

- Click the **Save** button.

Viewing Claim Categories, Items and Item Defaults

- Select the **Administration** area and select the **G&B** page.
- Ensure the **Claim Definition** tab is selected.

If the category is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

The screenshot shows the 'Administration' area with the 'G&B' section selected. The 'Claim Definition' tab is active. The 'Category Details' section shows 'Category : CLO - Clothing Grants', 'Issue Type: Single', 'Is FSM: No', and 'Active : Yes'. A checked box 'Show only Active Categories and Items' is visible. Below this is a table of categories:

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

The 'Items in Category' section shows 'Item : CLOGEN - General Clothing Grant' and 'Active: Yes'. Below this is a table of items:

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

The 'Items Defaults' section shows a table of default values:

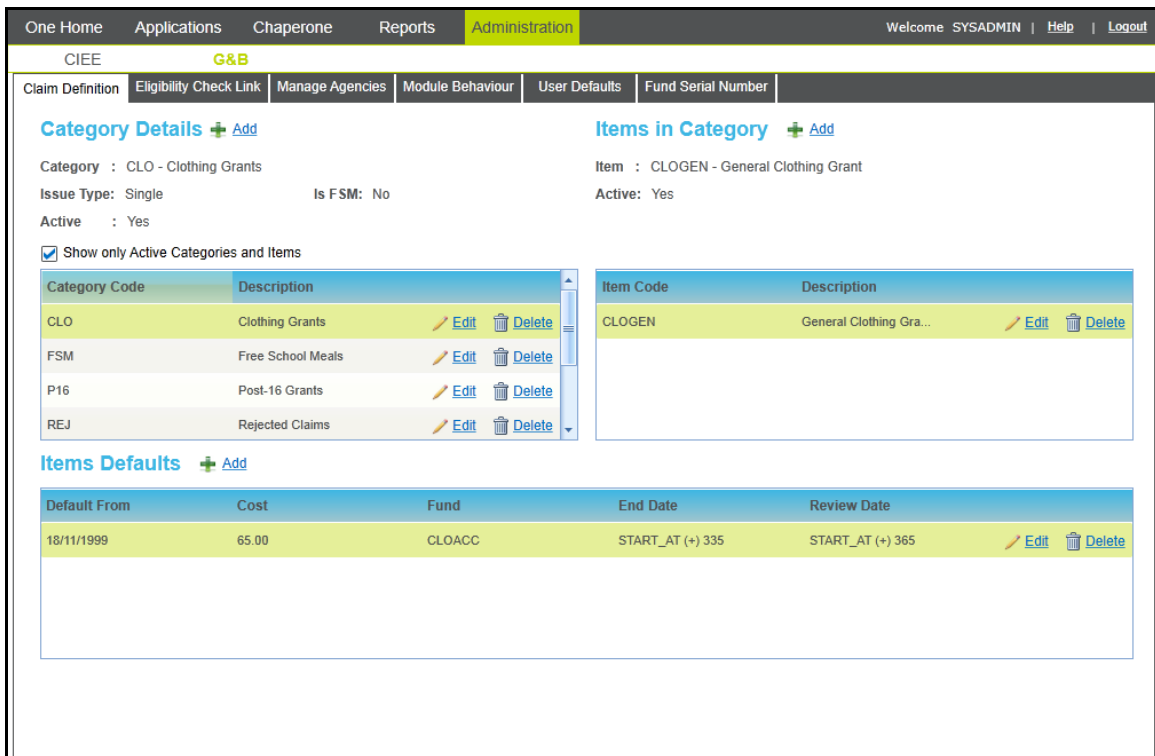
Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

- Highlight a category to display the associated items in the **Items in Category** area.
- Highlight an item in the **Items in Category** area to display the item defaults in the **Items Defaults** area.

Editing a Claim Category

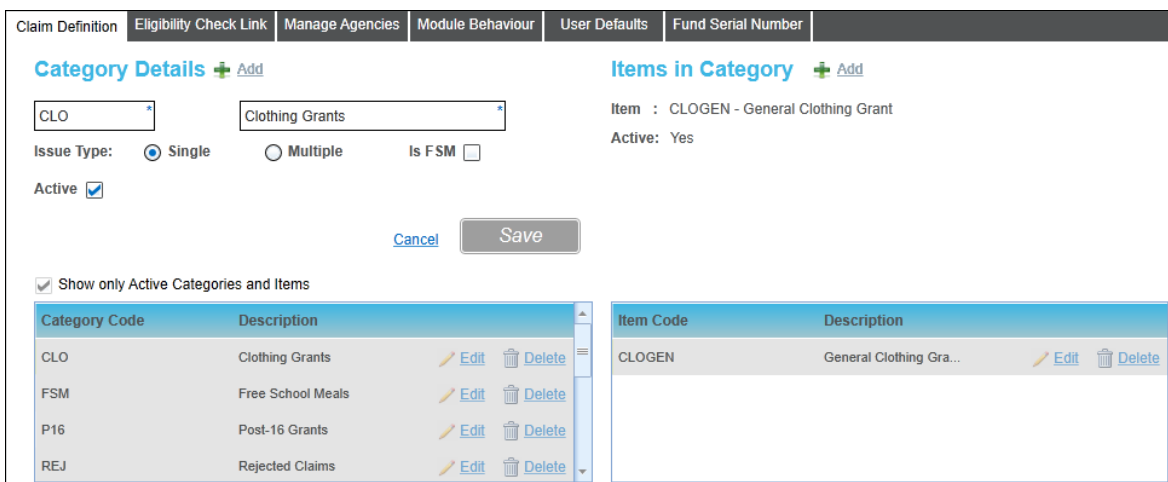
Claim category details can be edited. However, if the category has associated items, the **Category Code** cannot be edited.

- Select the **Administration** area and select the **G&B** page.
- Ensure the **Claim Definition** tab is open.



3. In the **Category Details** area, click the **Edit** hyperlink for the category you wish to edit.

If the category is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.



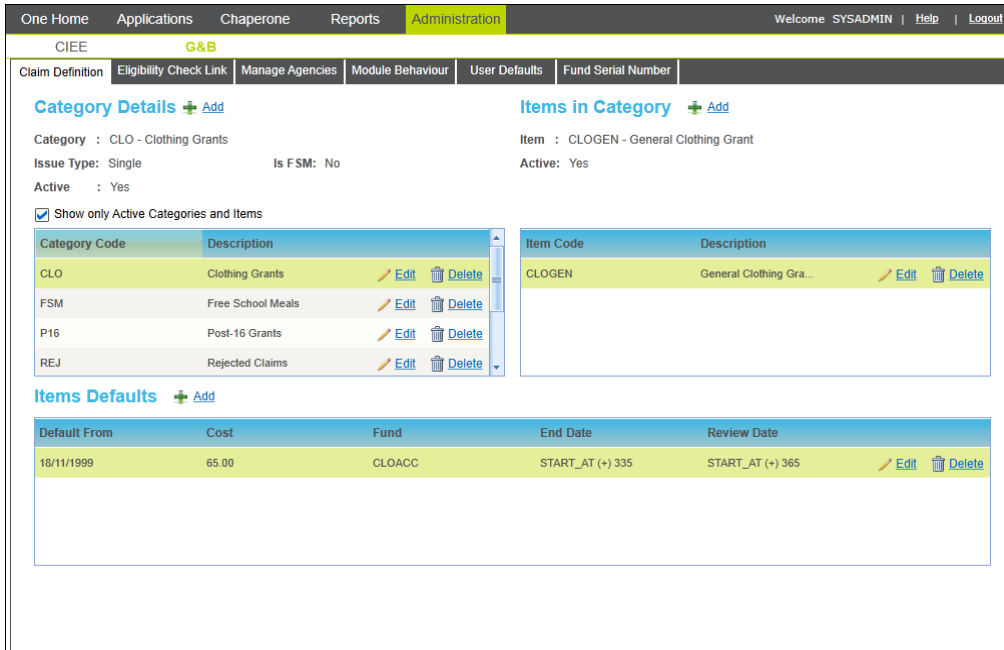
4. Make the required changes.
5. Click the **Save** button.

Deleting a Claim Category

If a claim category is no longer required, it can be deleted only if there are no items associated with it. If a category has associated items, you must delete them before you can delete the category.

To delete a claim category:

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.



3. For the category you wish to delete, click the **Delete** hyperlink to display the **Maintain Claim Category Details** dialog.

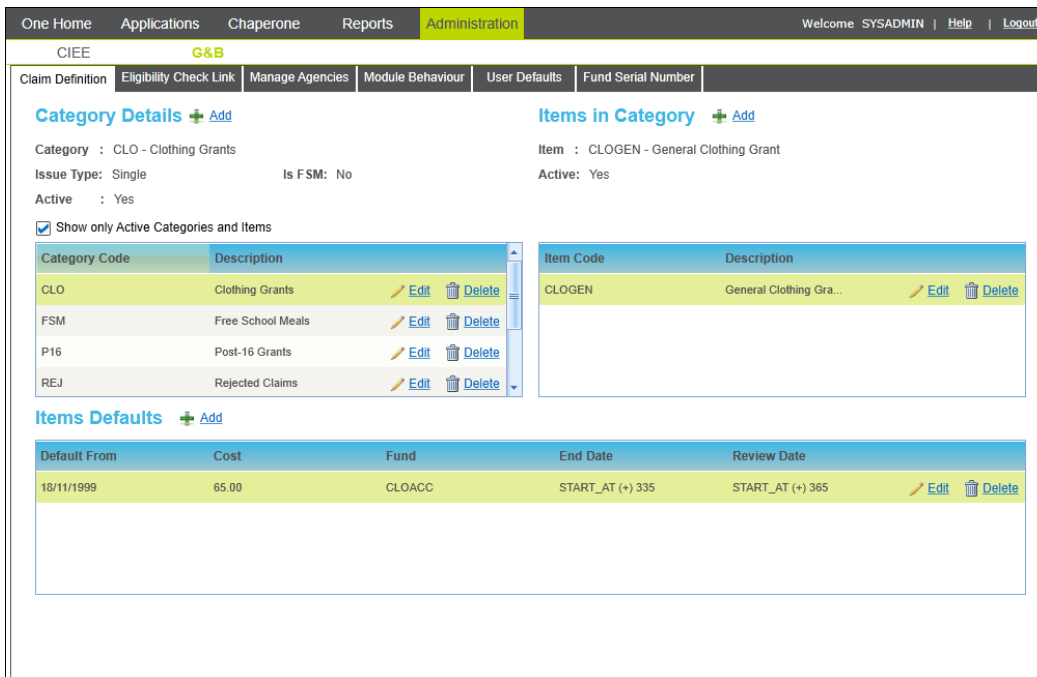
If the category is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. Click the **Yes** button to delete the category.

Adding Items to a Category

After creating a category, it must have individual items added to it. Items are required because claim applications are made against specific items (not categories).

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.



- In the **Category Details** section, select the category to which you wish to add an item. Any items that already exist for the category are displayed in the **Items in Category** section.

- In the **Items in Category** section, click the **Add** button to display editable fields relating to item details.

- Enter an **Item Code**. The three character code entered here is concatenated with the existing category code to create the full item code.

NOTE: The **Item Code** cannot be edited after the item is saved.

- Enter an **Item Description**.

NOTE: If you do not want the item to be immediately available to users, deselect the **Active** check box.

- Click the **Save** button.

The item is added to the **Items in Category** list.

More Information

[Adding Item Defaults](#) on page 15

Editing Items

The **Active** status and the **Item Description** of an item can be edited. Once created, the **Item Code** cannot be edited.

1. Select the **Administration** area and select the **G&B** page
2. Ensure the **Claim Definition** tab is open.

The screenshot shows the 'Administration' section of the system. The 'G&B' (Grants and Benefits) tab is selected. Under the 'Claim Definition' sub-tab, the 'Category Details' section is active. It displays the following information:

- Category:** CLO - Clothing Grants
- Issue Type:** Single
- Is FSM:** No
- Active:** Yes
- Show only Active Categories and Items

Below this information are two tables:

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Below these tables is the 'Items Defaults' section, which includes a table with columns for Default From, Cost, Fund, End Date, and Review Date. The first row shows values: 18/11/1999, 65.00, CLOACC, START_AT (+) 335, and START_AT (+) 365. Edit and Delete links are provided for this row.

3. In the **Category Details** area, highlight the category for the item you wish to edit to display a list of items in the **Items in Category** area.

If the category or item is already inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. Click the **Edit** hyperlink for the item you wish to edit.

This screenshot shows the 'Items in Category' section of the 'Category Details' page. The 'CLO' category is selected, and the 'CLOGEN' item is highlighted. The 'Edit' link for 'CLOGEN' has been clicked, opening an edit form. The form contains the following fields:

- Category:** CLO - Clothing Grants
- Issue Type:** Single
- Is FSM:** No
- Active:**
- Item Code:** CLO
- Item Description:** GEN
- Item Description (full):** General Clothing Grant

At the bottom right of the form are 'Cancel' and 'Save' buttons. The 'Show only Active Categories and Items' checkbox is checked. The tables from the previous screenshot are visible in the background.

5. Make the required changes.
6. Click the **Save** button.

Deleting Items

An item can be deleted only if it is removed from all claims and all the associated item defaults have been removed from it.

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

The screenshot shows the 'Administration' section of the system, specifically the 'G&B' (Grants and Benefits) area. The 'Claim Definition' tab is active. The interface is divided into several sections:

- Category Details:** Shows 'Category : CLO - Clothing Grants', 'Issue Type: Single', 'Is FSM: No', and 'Active : Yes'. A checkbox 'Show only Active Categories and Items' is checked.
- Items in Category:** Shows 'Item : CLOGEN - General Clothing Grant' and 'Active: Yes'. Below this is a table with one item:

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete
- Items Defaults:** Shows a table with one default entry:

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, highlight the category for the item you wish to delete to display a list of items in the **Items in Category** area.

If the category or item is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. For the item you wish to delete, click the **Delete** hyperlink to display the **Maintain Claim Item In Category Details** dialog.
5. Click the **Yes** button to delete the item.

Managing Item Defaults

Certain data can be added to each item via the **Item Defaults** section. When a user adds an item with defaults defined to a claim, they are asked if they wish to use the defaults. They can choose not to use the defaults or change them as required.

Default End Date and Review Date Options

When creating the default values for an item, you must select a **Default End Date Method** and a **Default Review Date Method**. The end date and review dates can be set as a **Fixed** date, **Calculated** based on selected criteria or set to **Maximum School Leaving Date**.

If you select a calculated method, you must select a date on which the calculation is based from the **Calc Field**. Then you must enter an **Offset**, which is the number of days after the selected date the item either ends or must be reviewed. For example, to set the default end date to 20 days after the claim start date, select **Start Date** from the **Calc Field** and enter 20 in the **Offset (days)** field.

If you select **Maximum School Leaving Date**, when this item is added to a claim, then the end date for the item claim is automatically set to the last school date for the selected student.

Adding Item Defaults

Item Defaults information is added automatically to a G&B application when the item is selected.

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is selected.
3. Select the item to which you wish to add item default information by selecting the required category then selecting the item.

Setting Up and Administering Grants and Benefits

One Home Applications Chaperone Reports **Administration** Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number

Category Details + Add

Category : SAM - Documentation test category
 Issue Type: Multiple Is FSM: No
 Active : Yes

Show only Active Categories and Items

Category Code	Description	Edit	Delete
TRA	Transport	Edit	Delete
GGE	Clothing General	Edit	Delete
DIS	Discretionary	Edit	Delete
SAM	Documentation test c...	Edit	Delete

Items in Category + Add

Item : SAMESS - An essential item.
 Active: Yes

Item Code	Description	Edit	Delete
SAMES2	A second essential i...	Edit	Delete
SAMESS	An essential item.	Edit	Delete

Items Defaults + Add

Default From	Cost	Fund	End Date	Review Date
No results found				

- In the **Items Defaults** section, click the **Add** hyperlink to display editable fields relating to item detail.

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number ECS Batch Validation

25/04/2013 Default Fund Cox

Default End Date Method

Fixed

Calculated

Maximum School Leaving Date

Default Review Date Method

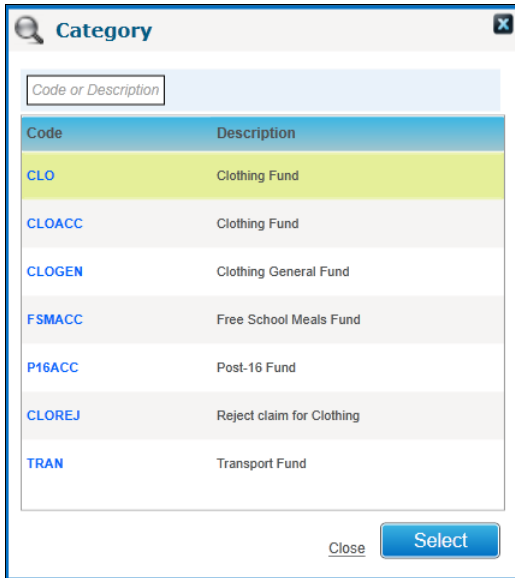
Fixed

Calculated

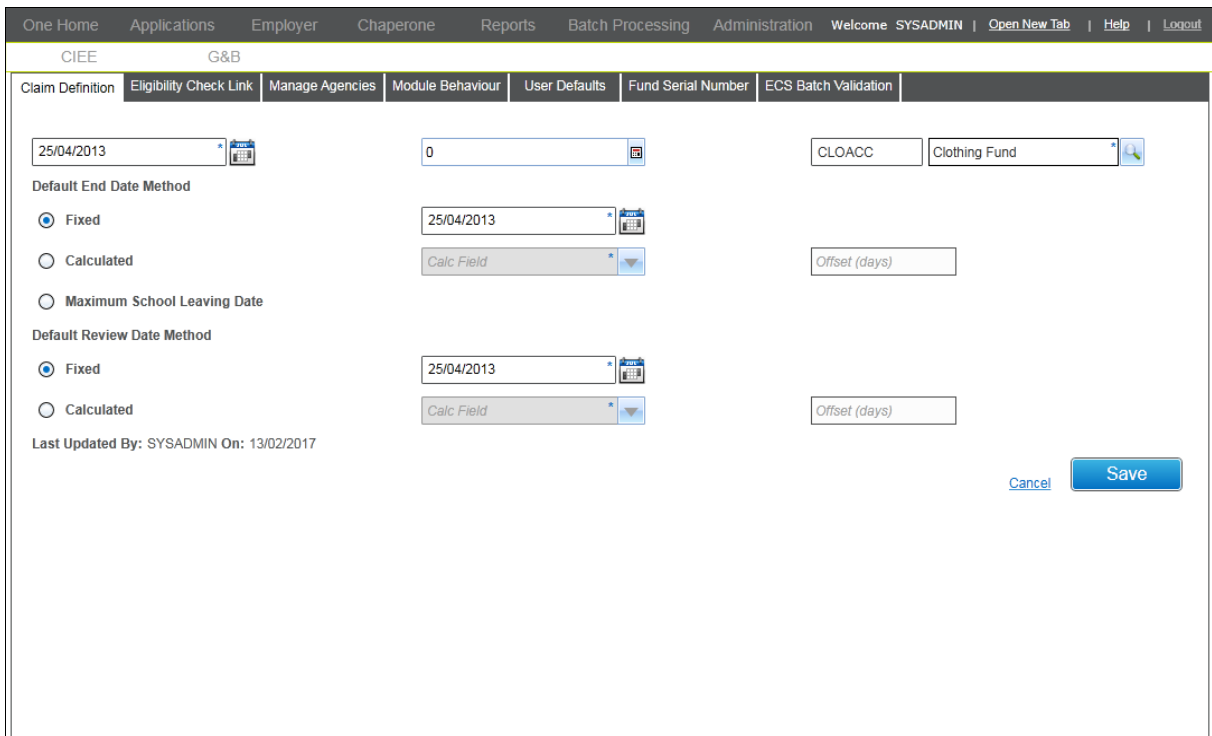
Last Updated By: SYSADMIN On: 13/02/2017

[Cancel](#) [Save](#)

- If required, select a new **Default From** date.
- Enter a **Default Cost** for the item.
- Click the **Default Fund** browse button to display the **Category** browser.



- Highlight the required fund then click the **Select** button to add the details and close the dialog.



- Select a **Default End Date Method**.

If you selected **Fixed**, you can select a new **Fixed End Date**

If you selected **Calculated**, you must select a **Calc Field** and enter an **Offset**. For more information, see [Default End Date and Review Date Options](#) on page 14.

- Select a **Default Review Date Method**.

If you selected **Fixed**, enter a **Fixed Review Date**.

If you selected **Calculated**, select a **Calc Field** and enter an **Offset**. For more information, see [Default End Date and Review Date Options](#) on page 14.

- Click the **Save** button.

Editing Item Defaults

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

The screenshot shows the G&B Administration interface. At the top, there is a navigation bar with 'Administration' highlighted. Below it, the 'Claim Definition' tab is selected. The interface is divided into three main sections:

- Category Details:** Shows details for 'CLO - Clothing Grants'. It includes fields for 'Issue Type: Single', 'Is FSM: No', and 'Active: Yes'. A checkbox 'Show only Active Categories and Items' is checked.
- Items in Category:** Shows a list of items under the selected category. One item, 'CLOGEN - General Clothing Grant', is listed with 'Active: Yes'.
- Items Defaults:** Shows a table of default values for the selected item.

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, highlight the category for the item you wish to edit to display a list of items in the **Items in Category** area.
If the category or item is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.
4. In the **Items in Category** area, highlight the required item to display the associated defaults in the **Items Defaults** area.
5. Click the **Edit** hyperlink for item default you wish to edit.

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number ECS Batch Validation

18/11/1999 65 CLOACC Clothing Fund

Default End Date Method

Fixed

Calculated

Maximum School Leaving Date

Default Review Date Method

Fixed

Calculated

Last Updated By: SYSADMIN On: 13/02/2017

Cancel Save

6. Make the required changes.
7. Click the **Save** button.

Deleting Item Defaults

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

One Home Applications Chaperone Reports Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number

Category Details + Add

Category : CLO - Clothing Grants

Issue Type: Single Is FSM: No

Active : Yes

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Items in Category + Add

Item : CLOGEN - General Clothing Grant

Active: Yes

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Items Defaults + Add

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, highlight the category for the item you wish to edit to display a list of items in the **Items in Category** area.

Setting Up and Administering Grants and Benefits

If the category or item is inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. In the **Items in Category** area, highlight the required item to display the associated defaults in the **Items Defaults** area.
5. For the items default you wish to delete, click the **Delete** hyperlink to display the **Maintain Claim Item Default** dialog.
6. Click the **Yes** button to delete the item default.

Setting Active Status for Categories and Items

Claim categories and items have an **Active** check box, which is selected by default when they are created. If the **Active** check box is selected for a category or item, users can select the category/item when creating a claim. However, if the **Active** check box is deselected, users cannot select the category or item when making a claim.

If you make an entire category inactive, none of the items associated with the category are available to add to a claim. However, you can make an item inactive without making the entire category inactive.

Setting the Active Status for a Category

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

The screenshot displays the 'Administration' section of the system, specifically the 'G&B' (Grants and Benefits) page. The 'Claim Definition' tab is active. The interface is divided into several sections:

- Category Details:** Shows 'Category : CLO - Clothing Grants', 'Issue Type: Single', 'Is FSM: No', and 'Active : Yes'. A checkbox for 'Show only Active Categories and Items' is checked.
- Items in Category:** A table listing items associated with the category. One item is visible: 'CLOGEN - General Clothing Grant' with 'Active: Yes'.
- Items Defaults:** A table showing default values for the selected item. The first row shows: 'Default From: 18/11/1999', 'Cost: 65.00', 'Fund: CLOACC', 'End Date: START_AT (+) 335', and 'Review Date: START_AT (+) 365'.

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, click the **Edit** hyperlink for the category you wish to make active or inactive.

If the category is already inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

Category Details + Add

Category: CLO Clothing Grants

Issue Type: Single Multiple Is FSM

Active

Cancel Save

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

4. Select or deselect the **Active** check box as required.
5. Click the **Save** button.

Setting the Active Status for an Item

1. Select the **Administration** area and select the **G&B** page.
2. Ensure the **Claim Definition** tab is open.

One Home Applications Chaperone Reports Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Category Details + Add

Category : CLO - Clothing Grants

Issue Type: Single Is FSM: No

Active : Yes

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

Items Defaults + Add

Default From	Cost	Fund	End Date	Review Date	Edit	Delete
18/11/1999	65.00	CLOACC	START_AT (+) 335	START_AT (+) 365	Edit	Delete

3. In the **Category Details** area, highlight the category for the item you wish to edit to display a list of items in the **Items in Category** area.

If the category or item is already inactive, deselect the **Show only Active Categories and Items** check box to display all the categories.

4. Click the **Edit** hyperlink for item you wish to make active or inactive.

Category Details + Add

Category : CLO - Clothing Grants
 Issue Type: Single
 Active : Yes

Is FSM: No

Items in Category + Add

CLO GEN General Clothing Grant

Active

Cancel Save

Show only Active Categories and Items

Category Code	Description	Edit	Delete
CLO	Clothing Grants	Edit	Delete
FSM	Free School Meals	Edit	Delete
P16	Post-16 Grants	Edit	Delete
REJ	Rejected Claims	Edit	Delete

Item Code	Description	Edit	Delete
CLOGEN	General Clothing Gra...	Edit	Delete

5. Select or deselect the **Active** check box as required.
6. Click the **Save** button.

Adding an Eligibility Check Link

The **Eligibility Check Link** tab enables you to link a specific benefit to a claim category. After a link is created, when a parent/carer makes a new claim, One checks the entries in the **Department Work Pensions And eligibility Check** tab to verify that they receive the benefits required to qualify for a claim in the specified category. If the required benefit claim is not entered in the **Department Work Pensions and Eligibility Check** tab, the application cannot be saved with a **Status of Authorised**; it must be saved as either **Pending** or **Rejected**.

IMPORTANT NOTE: For eligibility check linking to work, you must also select the **DSS Checking Active** check box in the **Administration | G&B | Module Behaviour** tab. For more information, see [Module Behaviour Options](#) on page 27.

The following graphic displays a list of existing links for a sample site:

Claim Category	Description	Benefit	Description	Valid From	Valid To	Updated By	Updated Date	Edit	Delete
FSM	Free School Meals	CTC	Child Tax Credit	1/4/2003	31/3/2004	JULIES	08/05/2003	Edit	Delete
FSM	Free School Meals	IS	Income Support	7/1/2000	28/4/2007	PHILJ	24/01/2006	Edit	Delete
FSM	Free School Meals	AS	Asylum Seeker	1/1/2000	31/12/2007	PHILJ	24/01/2006	Edit	Delete
FSM	Free School Meals	JSAIB	Job Seeker Allow-I.	1/1/2000	31/12/2007	PHILJ	24/01/2006	Edit	Delete

The **Claim Category** column displays which categories have links to required benefits, and the **Benefit** column displays the actual name of the required benefit. A **Claim Category** can have multiple required benefits, but each link must be created separately.

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Eligibility Check Link** tab.

The screenshot shows the 'Administration' page with a table titled 'DSS Claims Required'. The table has columns for Claim Category, Description, Benefit, Description, Valid From, Valid To, Updated By, and Updated Date. There are four rows of data, each with 'Edit' and 'Delete' buttons.

Claim Category	Description	Benefit	Description	Valid From	Valid To	Updated By	Updated Date
FSM	Free School Meals	CTC	Child Tax Credit	1/4/2003	31/3/2004	JULIES	08/05/2003
FSM	Free School Meals	IS	Income Support	7/1/2000	28/4/2007	PHILJ	24/01/2006
FSM	Free School Meals	AS	Asylum Seeker	1/1/2000	31/12/2007	PHILJ	24/01/2006
FSM	Free School Meals	JSAIB	Job Seeker Allow-1	1/1/2000	31/12/2007	PHILJ	24/01/2006

3. Click the **Add** hyperlink to display editable fields relating to **Check Link Detail**.

The screenshot shows the 'Check Link Detail' form with four input fields: 'Claim Category', 'Benefit Required', 'Valid From', and 'Valid To'. Each field has a browse button. There are 'Cancel' and 'Save' buttons at the bottom.

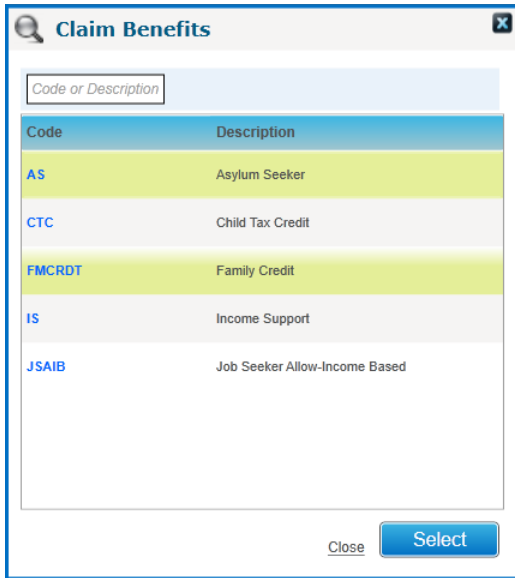
4. Click the **Claim Category** browse button to display the **Claim Category** browse.

The screenshot shows a 'Claim Category' browse dialog with a search box and a list of categories. The 'BAL' category is highlighted. There are 'Close' and 'Select' buttons at the bottom.

Code	Description
BAL	Balas Claims
CLO	Clothing Grants
FSM	Free School Meals
P16	Post-16 Grants
REJ	Rejected Claims
TRA	Transport
CGE	Clothing General

5. Highlight the required category and click the **Select** button to add it to the **Check Link Details**.

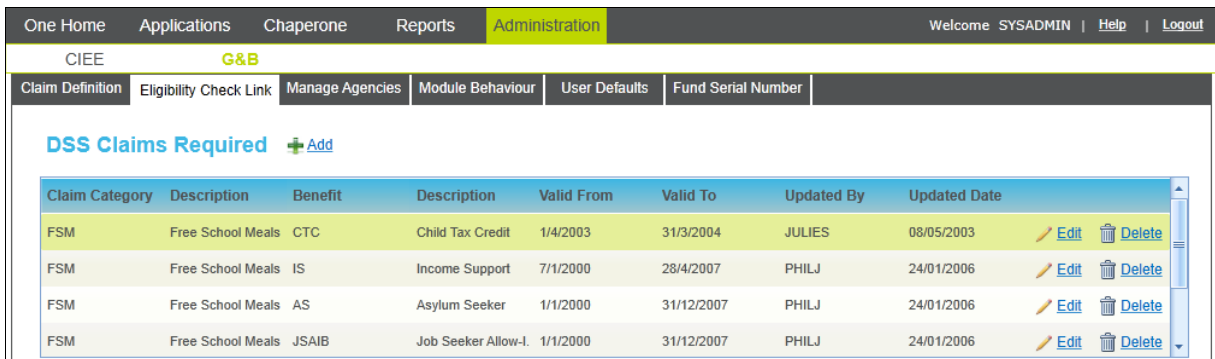
6. Click the **Benefit Required** browse button to display the **Claim Benefits** browser.



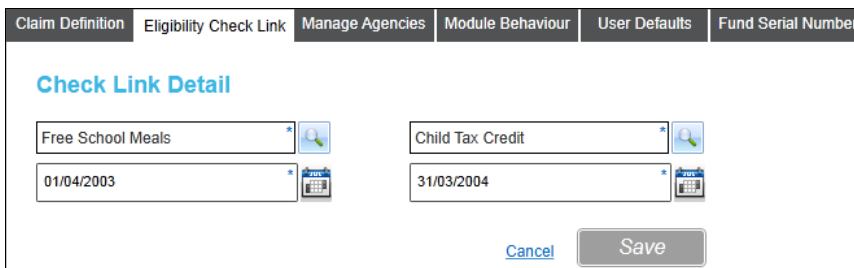
7. Highlight the benefit that the applicant must be in receipt of in order to make the claim.
8. Click the **Select** button to add the benefit to the **Check Link Details**.
9. Select a **Valid From** and **Valid To** date.
10. Click the **Save** button to create the link between the selected category and benefit.

Editing an Eligibility Check Link

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Eligibility Check Link** tab.



3. For the link you wish to update, click the **Edit** hyperlink to enable editing.



4. Make the required changes.
5. Click the **Save** button.

Deleting an Eligibility Check Link

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Eligibility Check Link** tab.

Claim Category	Description	Benefit	Description	Valid From	Valid To	Updated By	Updated Date
FSM	Free School Meals	CTC	Child Tax Credit	1/4/2003	31/3/2004	JULIES	08/05/2003
FSM	Free School Meals	IS	Income Support	7/1/2000	28/4/2007	PHILJ	24/01/2006
FSM	Free School Meals	AS	Asylum Seeker	1/1/2000	31/12/2007	PHILJ	24/01/2006
FSM	Free School Meals	JSAIB	Job Seeker Allow-I.	1/1/2000	31/12/2007	PHILJ	24/01/2006

3. For the link you wish to delete, click the **Delete** hyperlink to display the **Delete Eligibility Check Link** dialog.
4. Click the **Yes** button to delete the link.

Managing Agencies

Agencies are social service entities that can be associated with an application as well as stores to which payments can be made. In One v4 Online, agencies are maintained via the **Manage Agencies** tab.

When a new agency is added, it is automatically added to the correct lookup, based on the **Agency Type**. The following table summarises where each **Agency Type** is used in One v4 Online.

Agency Type	Used In
DSS	DWP Office drop-down list in the Claim Details section of an application's Basic Details tab.
Shop/Store	Select a Shop/Store dialog, accessed when recording details in the Payments tab.
Social Services	Social Services drop-down list in the Claim Details section of an application's Basic Details tab.

Adding an Agency

NOTE: After an agency is added, it cannot be deleted.

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Manage Agencies** tab.

Setting Up and Administering Grants and Benefits

One Home Applications Chaperone Reports Batch Processing **Administration** Welcome SYSADMIN | Help | Logout

CIEE **G&B**

Claim Definition Eligibility Check Link **Manage Agencies** Module Behaviour User Defaults Fund Serial Number

Agencies [+ Add](#)

Name: BHS - British Home Stores Address: Agency Code: BHS Agency Type: Shop/Store Contact Name: Mrs H Anderson Phone: 01234 684090
 Fax Number: 01234 487290 Email: BHS@Bedford.co.uk

Agency Name	Agency Code	Agency Type	
BHS - British Home Stores	BHS	Shop/Store	Edit
Department for Work & Pensions Bedford	DWPB	DSS	Edit
Marks & Spencer	MS	Shop/Store	Edit
Social Services (Bedford)	SSB	Social Services	Edit

- Click the **Add** button to display editable fields relating to the agency details.

Agencies [+ Add](#)

Name

Select Current Address [Clear Address](#)

Agency Code Agency Type

Contact Name Phone

Fax Number Email

[Cancel](#) [Save](#)

- Enter a **Name**.
- Select an **Address**.
- Enter a unique **Agency Code**.

NOTE: After saving an agency for the first time, the **Agency Code** cannot be changed.

- Select an **Agency Type**.
- If required, enter any other optional information.
- Click the **Save** button to record the agency details and add the new agency to the list.

Claim Definition Eligibility Check Link **Manage Agencies** Module Behaviour User Defaults Fund Serial Number

Agencies [+ Add](#)

Name: BHS - British Home Stores Address: Agency Code: BHS Agency Type: Shop/Store Contact Name: Mrs H Anderson Phone: 01234 684090
 Fax Number: 01234 487290 Email: BHS@Bedford.co.uk

Agency Name	Agency Code	Agency Type	
BHS - British Home Stores	BHS	Shop/Store	Edit
Department for Work & Pensions Bedford	DWPB	DSS	Edit
Marks & Spencer	MS	Shop/Store	Edit
Social Services (Bedford)	SSB	Social Services	Edit
The Chemist	999	Shop/Store	Edit

Editing Agency Details

If required, most agency details can be edited. However, the **Agency Code** that was assigned when the agency was first added cannot be changed.

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Manage Agencies** tab.
3. For the agency you wish to edit, click the **Edit** hyperlink to enable editing.
4. Make the required changes.
5. Click the **Save** button.

Module Behaviour Options

The **Module Behaviour** tab is used to administer the validations throughout the G&B area as well as enter details to enable users to perform checks via the DfE's Eligibility Checking System (ECS).

There are two sets of options that can be edited; the **Module Behaviour** settings and the **ECS Override Settings**. For most Local Authorities, the **ECS Override Settings** will never be used and should be edited only when instructed by Capita to do so. The following table describes the options in this tab.

Option	Description
Module Behaviour	
NI Number required on Parent/Carer Claims	If this box is selected, for any new parent/carers claims, the National Insurance (NI) number will be mandatory in all fields requesting the number. An application cannot be saved if National Insurance field is blank. NOTE: If adding a claim to an asylum seeker guardian (as recorded in the Person Basic Details tab), this option is ignored as no NI is required.
DSS Checking Active	All new claims made require the guardian to have the appropriate benefit recorded, as indicated by the eligibility check. For more information, see Adding an Eligibility Check Link on page 22.
Base Open Days	The number of days the school is open for students each year. This number is used when calculating the cost of a Free School Meals claim.
ECS Environment	Live – Select this to connect to the production ECS environment provided by the DWP. This should be selected after testing your environment in the ECS sandpit environment. Sandpit – Select this to connect to the development ECS environment provided by the DWP. This environment can identify connectivity issues with the DWP ECS service before going live. Mock – This is for Capita testing purposes <u>only</u> . Do not attempt to use this environment.
ECS Local Authority	The name of the LA as provided by the DWP.
ECS Username	Username provided to the LA to access the ECS. This is provided by the DWP.

Option	Description
ECS Password	Password to accompany the ECS username. This is provided by the DWP.
ECS Override Settings	
ECS Service URI Override	<u>Leave blank</u> unless instructed to do so by Capita.
ECS Service Version Override	<u>Leave blank</u> unless instructed to do so by Capita.

ECS Validation Firewall Access

The G&B ECS batch validation check now calls the external DfE website from the integration server. Previously, this check called from the One web server. In order to communicate with the DfE ECS, you must ensure that any firewalls in your One environment allow access to the following DfE URLs:

DfE Environment Type	URL
Prototype	https://fsm2.education.gov.uk/webservices/prototype/20160901/OnlineQueryService.svc
Sandpit	https://fsm2.education.gov.uk/webservices/Sandpit/20160901/OnlineQueryService.svc
Accreditation	https://fsm2.education.gov.uk/webservices/Accreditation/20160901/OnlineQueryService.svc
Production	https://fsm.education.gov.uk/fsm.laweb-service/20160901/OnlineQueryService.svcxcv\sdv
Production (for systems that connect via GSI/PSN)	https://fsm.education.gsi.gov.uk/fsm.laweb-service/20160901/OnlineQueryService.svc

Editing the Module Behaviour Options

1. Select the **Administration** area and select the **G&B** page.
2. Select the **Module Behaviour** tab.

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number ECS Batch Validation

Module Behaviour [Edit](#)

NI Number required on Parent/Carer Claims : Yes
 DSS Checking Active : Yes
 Base Open Days : 190
 ECS Environment : Live
 ECS Local Authority :
 ECS Username :
 ECS Password : Update ECS Password

ECS Override Settings

These 'Override' Settings will normally be empty. They should only be set after guidance from CAPITA

ECS Service URI Override

ECS Service Version Override

3. Click the **Edit** hyperlink to enable editing.

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Help | Logout

CIEE G&B

Claim Definition Eligibility Check Link Manage Agencies Module Behaviour User Defaults Fund Serial Number ECS Batch Validation

Module Behaviour [Edit](#)

NI Number required on Parent/Carer Claims
 DSS Checking Active
 190
 Live

 •

ECS Override Settings

These 'Override' Settings will normally be empty. They should only be set after guidance from CAPITA

ECS Service URI Override
 ECS Service URI Override
 ECS Service Version Override
 ECS Service Version Override

[Cancel](#) **Save**

4. Make the required changes to the options.
5. Click the **Save** button.

Understanding the User Defaults Options

The **User Defaults** tab enables you to set the defaults to be used when a new claim is created. Setting the appropriate defaults enables the rapid entry of claims. Values set in this tab automatically populate the relevant, required fields in a claim. Once added to an application, the default entries can be edited by the end user.

The following table describes the options in this tab.

Option	Description
Use Defaults on New Claim Records	If selected, all new claims will use the default values defined elsewhere in this tab.
Defaults Change Based on Last Claim Entry	If selected, when a new claim is created using a different value than the default value entered in this tab, the value in this tab is changed to reflect the value used in the most recent application.
Claim Item	The default Claim Item for all new claims.
Claim Status	The default Claim Status for all new claims.
Area Office	The default Area Office for all new claims.
Authorising Officer	The default Authorising Officer for all new claims.

Editing the User Defaults Options

1. Select the **Administration** area and select the **G&B** page.
2. Select the **User Defaults** tab.

3. Click the **Edit** hyperlink to enable editing.

4. Make the required changes to the options.
5. Click the **Save** button.

Configuring Serial Numbering

Serial numbers enable you to automatically assign a unique number to each claim processed. When configured, One generates a number based on the fund used to process the claim. The serial number consists of the **Prefix** and the **Next Numbers Issue**. The number generated is automatically entered in the **Serial No.** field of a claim when the claim is authorised.

IMPORTANT NOTES: Serial number formats cannot be deleted or edited after they have been created.

In the One v3 version of G&B, serial numbers are reset at the beginning of each year. In the v4 Online version of G&B, there are no years, and numbering continues year on year.

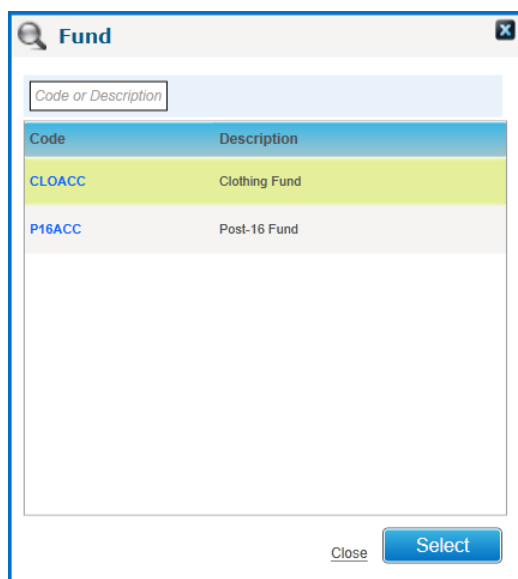
1. Select the **Administration** area and select the **G&B** page.
2. Select the **Fund Serial Number** tab.

Fund Code	Description	Prefix	Next Number Issue
CLO	Clothing Fund	CLO	104
CLOGEN	Clothing General Fund	CLO	102
CLOREJ	Reject claim for Clothing	ABC	3
FSMACC	Free School Meals Fund	CCC	5
TRAN	Transport Fund	TRA	9

3. Click the **Add** hyperlink to display editable fields relating to the serial number format.

4. Click the **Description** browse button to display the **Fund** browser.

Setting Up and Administering Grants and Benefits



5. Highlight the required fund then click the **Select** button to add the fund and close the dialog.
6. Enter a unique **Prefix**. This must be three alpha-numeric characters.
7. Enter a **Next Number Issue**.
8. Click the **Enable** button to display the **Grant and Benefits** dialog.
9. Click the **Yes** button to record the number format.

If there are authorised claims recorded against the fund you have selected that do not have serial numbers, a second dialog is displayed. Click the **Yes** button if you want to add serial numbers to existing claims or the **No** button to leave existing authorised claims unchanged.

04 | Creating a New Grants and Benefits Application

Introduction

Grants and Benefits (G&B) applications are created for students seeking funding from the Local Authority. Generally, this funding is in the form of Free School Meals (FSM), but can also cover other funding that may be available from the government and managed by the LA. After an application is approved, the details are incorporated into the relevant areas of One.

Claims with Multiple Dependents

In previous versions of G&B in the v3 Client, the claim application process was parent/carer focused. When creating a claim, you searched for a parent/carer, which also returned a list of any dependents. This parent-centric approach is still available in G&B v4 Online.

However, in G&B v4 Online, claims can also be created in a student-centric manner. Due to the nature of information in the One database, it is more likely that a student record exists in the database than the parent/carer. Therefore, when creating an application, you can first search for a student. You can then associate the student with a parent/carer (either by selecting a parent/carer from the database who is already linked to the student or by adding them as a new parent/carer) and creating the appropriate relationship.

Regardless of who you add first, the parent/carer or student, after completing all the other details of the first application and clicking the **Create Application** button, you are prompted to create applications for other dependents. All students who are already registered as dependents of the parent/carer associated to the claim are listed, but you can also create a new association with a student record that already exists in the One database or add a new student record.

Creating a New Grants and Benefits Application (Student-Centric)

1. From within **Applications** area, select the **G&B** page.
2. Click the **Add New Application** hyperlink to display the **Create New G&B Application** page.
3. Click the **Student Name** browse button to display the **Select Student** browser.
4. Enter your search criteria then click the **Search** button to display a list of students who match the entered search criteria.

If the student is not already recorded in One, you can add them. For more information, see [Adding a New Student to the One Database](#) on page 44.

5. Select the check box for the student you wish to add to the claim application then click the **Select** button to add the student to the application and close the browser.

After adding a student, the fields in the **Claim Details** section become editable. If any fields have defaults defined, they are populated.

Creating a New Grants and Benefits Application

One Home Applications Employer Chaperone Reports Batch Processing Administration Welcome SYSADMIN | Open New Tab | Help | Logout

CIEE G&B

Create New G&B Application

Parent/Carer Name

+ Add New Student + Add New Parent/Carer ECS Validation

View Student Details

DOB : 17/01/2006 NI Number : - Asylum Seeker : No
 NCY : 5 Address : NASS Number :
 Registered Base : Brooklands Middle School Parent/Carer Contact Number :
 Address :
 74 Church Road, Jacksonham, Kafield, Foulshire, F3 1AC
 Student Contact Number :

Claim Details

General Free School Meal Free School Meals Fund PEND - Pending
 SAEO - Southern Area Edt DG - David Giles Social Services
 DWP Office
 13/07/2020 13/07/2020 24/06/2022
 0 Calculated Cost: Portal Reference: 08/05/2019
 Serial Number

Authorisation Details

Status Authorised Date: (dd/mm) Last Updated On: Last Updated By:
 Cancel Create Application

6. If a parent or carer is required for the application:
 - a. Click the **Parent/Carer Name** browse button to display the **Select a Parent/Carer** dialog.
 - b. Enter your search criteria then click the **Search** button to display a list of parents/carers who match the entered search criteria

If the parent/carers is not already recorded in One, you can add them. For more information, see [Adding a New Parent/Carer to the One Database](#) on page 44.
 - c. Select the check box for the required parent/carers then click the **Select** button to add them to the application and close the browser.
7. In the **Claim Details** section, click the **Claim Item** browse button to display the **Select Claim Code** dialog.

Select Claim Code

Filters Category Code Item Code

Category Code	Description	Item Code	Description
CLO	Clothing Grants	CLOGEN	General Clothing Grant
FSM	Free School Meals	FSMGEN	General Free School Meal
FSM	Free School Meals	FSMPRI	FSM Primary
P16	Post-16 Grants	P16BKS	Post-16 Book Grant
P16	Post-16 Grants	P16CLO	Post-16 Clothing Grant
P16	Post-16 Grants	P16TRL	Post-16 Travel Grant
REJ	Rejected Claims	REJCLO	Reject Clothing Claim
TRA	Transport	TRAFRE	Free Transport Pass
TRA	Transport	TRAIN	Travel In
CGE	Clothing General	CGES1	Shop One

Cancel Select

- Highlight the required item then click the **Select** button to add the item to the application and close the dialog.

If the administrator has defined defaults for the item, the **Capita One – Claim Details** confirmation dialog is displayed. If you want to use the defaults, click the **Yes** button. If you do not want to use the item defaults, click the **No** button.

- To add or change the **Fund**, click the adjacent browse button to display the **Fund** dialog.

The screenshot shows a dialog box titled "Fund" with a search bar and a table of fund options. The table has two columns: "Code" and "Description".

Code	Description
CLO	Clothing Fund
CLOACC	Clothing Fund
CLOGEN	Clothing General Fund
FSMACC	Free School Meals Fund
P16ACC	Post-16 Fund
CLOREJ	Reject claim for Clothing
TRAN	Transport Fund

At the bottom of the dialog, there are "Close" and "Select" buttons.

- Highlight the required fund then click the **Select** button to add it to the application and close the browser.

The screenshot shows the "Claim Details" form with the following fields:

- General Free School Meal: Free School Meals Fund
- Area: DWP Office
- DWP Office: 16/02/2015
- Received Date: 16/02/2015
- Start Date: 12/12/2014
- End Date: 16/02/2015
- Calculated Cost: 0
- Application Type: DRFT - Draft Application
- Officer: Officer
- Social Services: Social Services
- Portal Reference: 08/05/2014
- Serial Number: (empty)
- Status: (empty)
- Last Updated On: (empty)
- Last Updated By: (empty)

Buttons: Cancel, Create Application

- Select the required **Received Date**, **Start Date** and **End Date**.
- Select or enter any other optional claim information.

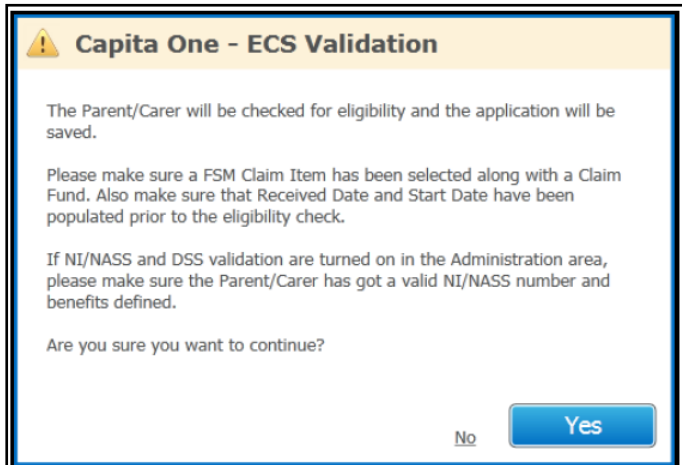
NOTE: If your One administrator has configured a serial number for the item, you cannot enter a **Serial Number**. The number is created automatically when the claim is authorised.

- In the **Authorisation Details** section, select the required **Status**.

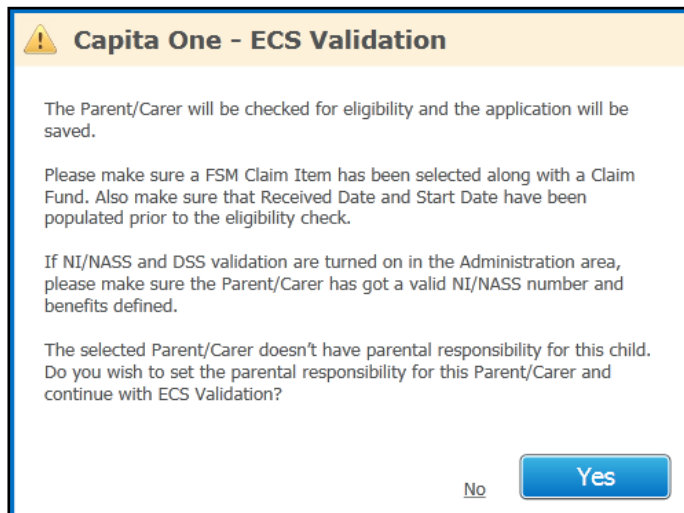
This screenshot is identical to the previous one, showing the "Claim Details" form with the same fields and values.

Creating a New Grants and Benefits Application

14. If required, click the **ECS Validation** to check the parent/carer's FSM eligibility. A confirmation dialog is displayed. If you do not need to run a check, skip to step 17.

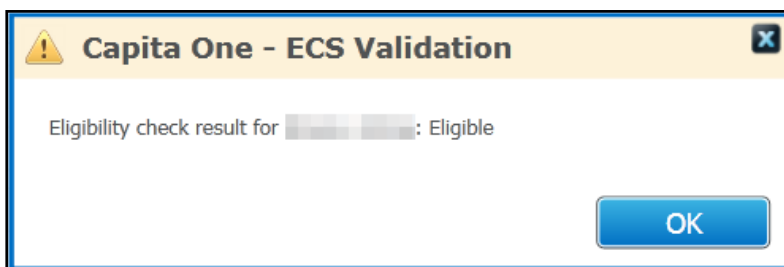


IMPORTANT NOTE: If you attempt an ECS validation and the selected parent/carer does not currently have parental responsibility designated in One, you are presented with the following confirmation dialog.



If you click the **Yes** button, One automatically assigns the parent/carer parental responsibility and performs the check. If you do not want to assign parental responsibility to this parent/carer, click the **No** button to cancel the check then add a parent/carer with parental responsibility. Parental responsibility can be changed manually anytime. For more information, see [Updating Parental Responsibility](#) on page 47.

15. Click the **Yes** button to perform the validation. When complete, the **Capita One – ECS Validation** dialog is displayed.



- Click the **OK** button to close the dialog. If there are no other dependents, the completed application is displayed. If there are other dependents associated with the parent/carer, the **Dependent Details** dialog is displayed and you should skip to step 18.

More Information:

[Checking Free School Meal Eligibility](#) on page 62

- Click the **Create Application** button. If there are additional dependents associated with the parent/carer, the **Dependent Details** dialog is displayed. If there are no other dependents, the saved application is displayed.

<input type="checkbox"/>	Name	Parental Responsibility	Relationship	Date of Birth	Active Claims
<input type="checkbox"/>	[redacted]	Yes	Mother	[redacted]	1
<input type="checkbox"/>	[redacted]	Yes	Mother	[redacted]	1
<input type="checkbox"/>	[redacted]	Yes	Mother	[redacted]	1
<input type="checkbox"/>	[redacted]	Yes	Mother	[redacted]	1

- For each additional dependent who requires an application, select the appropriate check box then click the **Yes** button. A new application is created for each selected dependent.

If required, click the **Add Dependent** button to select another student to add as a dependent. If the student you wish to add does not already exist in the One database, you can add them via the **Add New Student** hyperlink.

Click the **No** button if no additional applications are required.

The saved application details are displayed. If you added other dependents, applications are also created for them.

Basic Details

Claim Details

Claim Item : General Clothing Grant	Fund : Free School Meals Fund	Claim Status : Current
Area : Northern Area Education Office	Officer : D [redacted]	Social Services :
DWP Office :	Received Date : 01/02/2017	Portal Reference :
Start Date : 01/02/2017	End Date : 01/01/2030	Review Date : 01/02/2018
Claim Cost : 0.00	Calculated Cost :	Serial Number : FSM005144

Authorisation Details

Status : Authorised	Last Updated On : 01/02/2017	Last Updated By : System Administrator
---------------------	------------------------------	--

IMPORTANT NOTE: G&B can be configured to check that a parent/carer is receiving a specific benefit, listed in their **Department Work Pensions And Eligibility Check** tab, in order for their dependents to make a claim in certain categories. If you have just added the parent/carer or their **Department Work Pensions And Eligibility Check** tab has not been updated with all their benefits, you might not be able to save the application with a **Status of Authorised**. Instead, you can save the claim with a **Status of Pending** then add the required information to the parent/carer's **Department Work Pensions And Eligibility Check** tab, accessible via the **View Parent/Carer Details** hyperlink. For more information, see [Adding Benefit Claims](#) on page 76.

Creating a New Grants and Benefits Application (Parent-Centric)

- From within the **Applications** area, select the **G&B** page.

The screenshot shows the 'G&B' page under the 'Applications' menu. It features a search bar with the following fields: 'Student Name', 'Parent/Carer Name', 'Student DOB: (dd/mm/yyyy)', 'Start Date: (dd/mm)', and 'End Date: (dd/mm)'. There are 'More Options', 'Search by Student', 'Clear Search', and 'Search' buttons. Below the search bar is a table with the following columns: Student Name, Parent/Carer, Start Date, End Date, Claim Status, Student Address, Student DOB, Student NCY, Carer NI Number, Carer DOB, Fund Type, and Status.

- Click the **Add New Application** hyperlink to display the **Create New G&B Application** page.

The screenshot shows the 'Create New G&B Application' page. It is divided into three main sections:

- View Student Details:** Includes fields for Student Name, Person Name, DOB, NCY, Registered Base, Address, Student Contact Number, NI Number, Asylum Seeker, Address, NASS Number, and Parent/carer Contact Number.
- Claim Details:** Includes dropdowns for General Clothing Grant, Clothing Fund, NAEO (Northern Area Ed), DWP Office, and Social Services. It also has date pickers for start and end dates, a calculated cost field, and a Portal Reference field.
- Authorisation Details:** Includes a Status dropdown, Last Updated On, and Last Updated By fields.

 At the bottom right, there are 'Cancel' and 'Create Application' buttons.

- Click the **Person Name** browse button to display the **Person Search** browser.

The screenshot shows the 'Person Search' browser window. At the top, there are several search criteria fields: 'Title' (dropdown), 'Begins with' (dropdown), 'Contact Name' (text input), and 'Role' (dropdown). Below these are 'Gender' (dropdown), 'Postcode' (text input), and 'Base Name' (text input with a search icon). There are also checkboxes for 'Include Name History' (unchecked), 'Active' (checked), 'Employee Only' (unchecked), and 'Governor Only' (unchecked). A 'More Options' link is on the left, and 'Clear Search' and 'Search' buttons are on the right. The main area contains a table with the following headers: Name, Title, Chosen Name, Given Name 2, Person Id, DoB, Address, Postcode, NI Number, NASS Number, AsylumSeeker, Email. The table is currently empty. At the bottom left is an 'Add New Person' link, and at the bottom right are 'Close' and 'Select' buttons.

- Enter your search criteria then click the **Search** button to display a list of people who match the entered search criteria.

The screenshot shows the 'Person Search' browser window after a search. The search criteria fields are filled with 'Any' for 'Title', a blurred text for 'Contact Name', and 'Any' for 'Role'. 'Gender' is a dropdown, 'Postcode' is a text input, and 'Include Name History' and 'Active' are checked. The 'Search' button is highlighted. Below the search criteria, it says '47 People matching "[blurred]", Active People, Include Name History". The table below has the same headers as the previous screenshot and contains 47 rows of data, each with a checkbox in the first column. At the bottom left is an 'Add New Person' link, and at the bottom right are 'Close' and 'Select' buttons.

If the parent/carer is not already recorded in One, you can add them by clicking the **Add New Person** hyperlink. For more information, see [Adding a New Parent/Carer to the One Database on page 44](#).

- Select the check box for the parent/carer you wish to add to the claim application then click the **Select** button to add them to the application and close the browser.

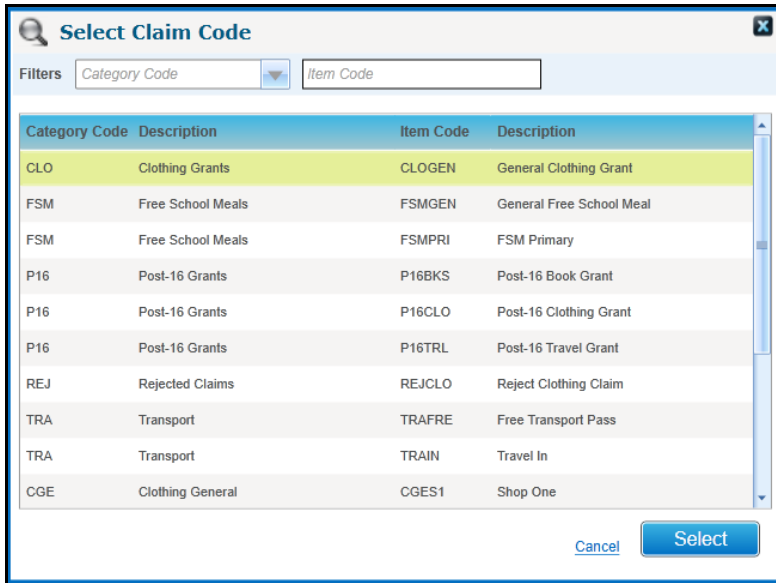
After adding a parent/carer, the fields in the **Claim Details** section become editable. If any fields have defaults defined, they are populated.

Creating a New Grants and Benefits Application

6. If the National Insurance number or the asylum seeker details are incorrect or missing:
 - a. Click the **Edit NINumber / AsylumSeeker** hyperlink to enable editing.
 - b. Enter the **NI Number**.
 - c. If required, select the **Asylum Seeker** check box.
 - d. Click the **Save** button.
7. Click the **Dependent** browse button to display the **Dependent Details** browser.

Name	Parental Responsibility	Relationship	Date of Birth	Active Claims
[Redacted]	Yes	[Redacted]	[Redacted]	0
[Redacted]	Yes	[Redacted]	[Redacted]	0
[Redacted]	Yes	[Redacted]	[Redacted]	0

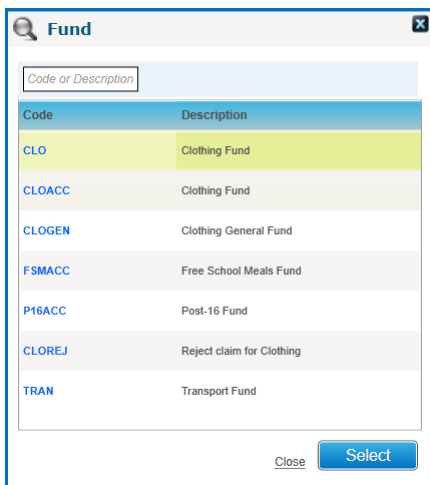
8. Highlight the first dependent for whom you wish to create an application, then click the **Select** button to add them to the application and close the dialog.
 If the student is not already recorded in One, click the **Add Dependent** hyperlink to add them. For more information, see [Adding a New Student to the One Database](#) on page 44.
9. In the **Claim Details** section, click the **Claim Item** browse button to display the **Select Claim Code** dialog.



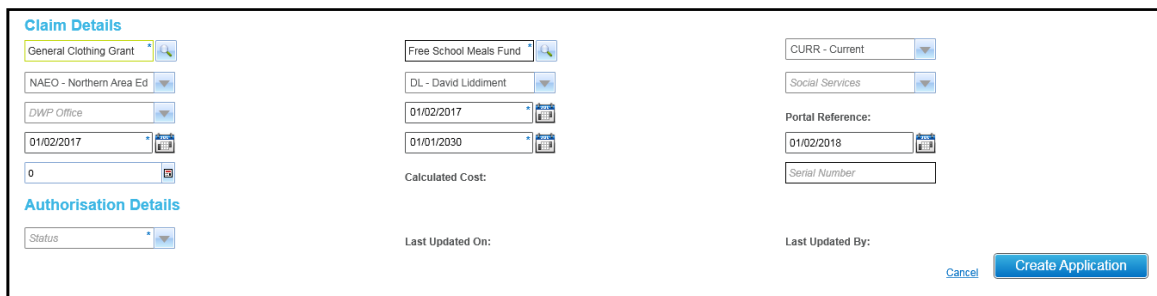
- Highlight the required item then click the **Select** button to add the item to the application and close the dialog.

If the administrator has defined defaults for the item, the **Capita One – Claim Details** confirmation dialog is displayed. If you wish to use the defaults, click the **Yes** button. If you do not wish to use the item defaults, click the **No** button.

- To add or change the **Fund**, click the adjacent browse button to display the **Fund** dialog.



- Highlight the required fund then click the **Select** button to add it to the application and close the browser.



- Select the required **Received Date**, **Start Date** and **End Date**.
- Select or enter any other optional claim information.

Creating a New Grants and Benefits Application

NOTE: If your One administrator has configured a serial number for the item, you cannot enter a **Serial Number**. The number is created automatically when the claim is authorised.

15. In the **Authorisation Details** section, select the required **Status**.

The screenshot shows a web form with two main sections: 'Claim Details' and 'Authorisation Details'.
Claim Details:
- 'General Free School Meal' dropdown menu.
- 'Free School Meals Fund' dropdown menu.
- 'CURR - Current' dropdown menu.
- 'NAEO - Northern Area Ed' dropdown menu.
- 'DL - David Liddiment' dropdown menu.
- 'Social Services' dropdown menu.
- 'DWP Office' dropdown menu.
- '01/02/2017' date field.
- '01/02/2017' date field.
- '01/01/2030' date field.
- '0' text input field.
- 'Calculated Cost:' label.
- 'Portal Reference:' label.
- '01/02/2018' date field.
- 'Serial Number' text input field.
Authorisation Details:
- 'Authorised' dropdown menu.
- 'Last Updated On: 01/02/2017' text.
- 'Last Updated By: SYSADMIN' text.
- 'Cancel' button.
- 'Create Application' button.

16. If required, click the **ECS Validation** to check the parent/carer's FSM eligibility. A confirmation dialog is displayed. If you do not need to run a check, skip to step 19.

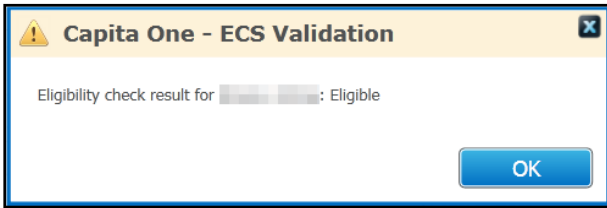
The dialog box has a yellow header with a warning icon and the title 'Capita One - ECS Validation'.
Text inside:
- 'The Parent/Carer will be checked for eligibility and the application will be saved.'
- 'Please make sure a FSM Claim Item has been selected along with a Claim Fund. Also make sure that Received Date and Start Date have been populated prior to the eligibility check.'
- 'If NI/NASS and DSS validation are turned on in the Administration area, please make sure the Parent/Carer has got a valid NI/NASS number and benefits defined.'
- 'Are you sure you want to continue?'
Buttons: 'No' and 'Yes'.

IMPORTANT NOTE: If you attempt an ECS validation and the selected parent/carer does not currently have parental responsibility designated in One, you are presented with the following confirmation dialog.

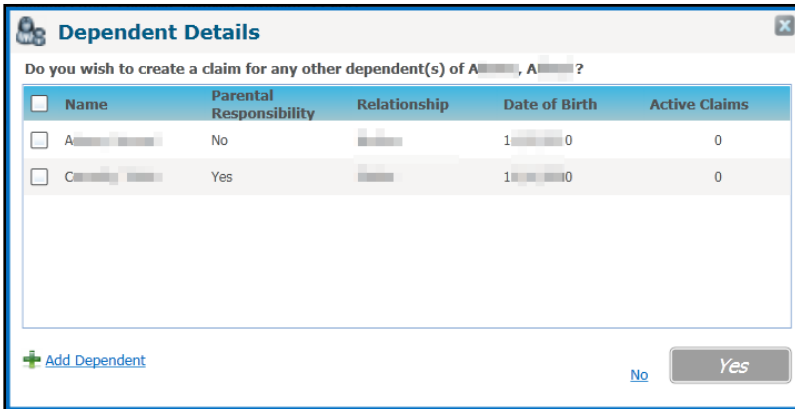
This dialog box is identical to the previous one but includes an additional line of text:
- 'The selected Parent/Carer doesn't have parental responsibility for this child. Do you wish to set the parental responsibility for this Parent/Carer and continue with ECS Validation?'

If you click the **Yes** button, One automatically assigns the parent/carer parental responsibility and performs the check. If you do not want to assign parental responsibility to this parent/carer, click the **No** button to cancel the check then add a parent/carer with parental responsibility. Parental responsibility can be changed manually anytime. For more information, see [Updating Parental Responsibility](#) on page 47.

- Click the **Yes** button to perform the validation. When complete, the **Capita One – ECS Validation** dialog is displayed.



- Click the **OK** button to close the dialog. If there are no other dependents, the completed application is displayed. If there are other dependents associated with the parent/carer, the **Dependent Details** dialog is displayed and you should skip to step 20.
- Click the **Create Application** button to display the **Dependent Details** dialog.

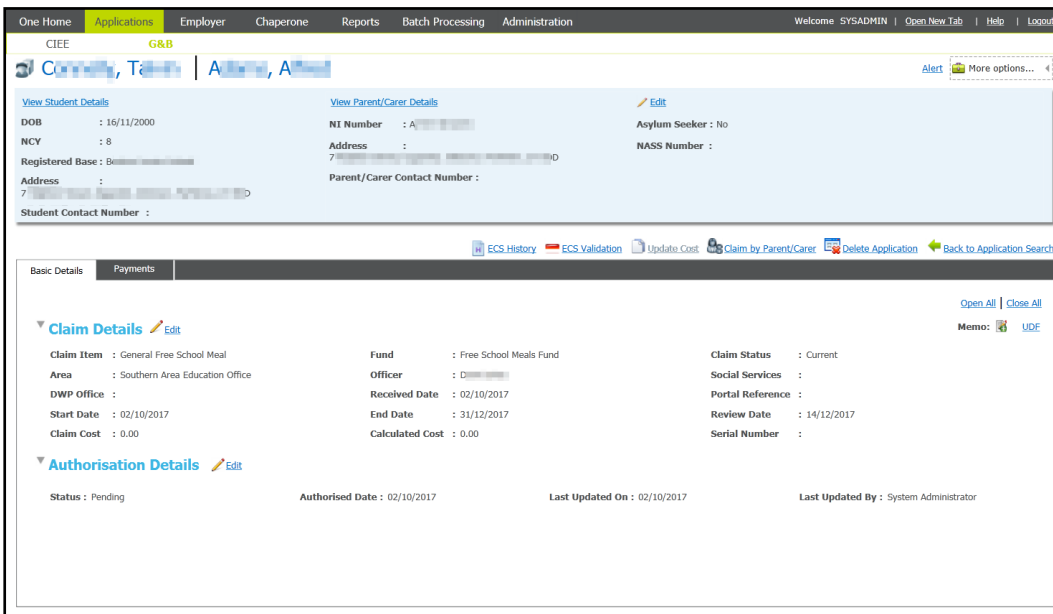


- For each additional dependent who requires an application, select the appropriate check box then click the **Yes** button. An application is created for each selected dependent.

If required, click the **Add Dependent** hyperlink to select another student to add as a dependent. If the student you wish to add does not already exist in the One database, you can add them via the **Add New Student** hyperlink.

Click the **No** button if no other applications are required.

The saved application details are displayed. If you added other dependents, applications are also created for them.



IMPORTANT NOTE: G&B can be configured to check that a parent/carer is receiving a specific benefit, listed in their **Department Work Pensions And Eligibility Check** tab, in order for their dependents to make a claim in certain categories. If you have just added the parent/carer or their **Department Work Pensions And Eligibility Check** tab has not been updated with all their benefits, you might not be able to save the application with a **Status** of **Authorised**. Instead, you can save the claim with a **Status** of **Pending** then add the required information to the parent/carer's **Department Work Pensions And Eligibility Check** tab, accessible via the **View Parent/Carer Details** hyperlink. For more information, see [Adding Benefit Claims](#) on page 76.

Adding a New Student to the One Database

1. From the **Create New G&B Application** page, click the **Add New Student** hyperlink to display the **Add New Student** dialog.
2. Enter the details for the student. **Forename**, **Surname**, **DOB** and **Gender** are required.
3. Enter any additional details for the student.
4. Click the **Save** button to return to the **Create New G&B Application** page.

Adding a New Parent/Carer to the One Database

1. From the **Create New G&B Application** page, click the **Add New Parent/Carer** hyperlink to display the **Add New Parent/Carer** dialog.
2. Enter the details for the parent/carer. **Forename**, **Surname**, **DOB** and **Gender** are required.
3. Enter any additional details for the parent/carer.
4. Click the **Save** button to return to the **Create New G&B Application** page.

Opening an Existing Application

You can search for applications based on student details, employer name or application specific details.

1. From within the **Applications** area, select the **G&B** page.

The screenshot displays the 'G&B' section of the 'Applications' page. At the top, there is a navigation bar with 'Applications' highlighted. Below this, the page title is 'CIEE G&B'. The main content area features a search interface with the following elements:

- A breadcrumb: 'Applications' with a plus icon and a link to 'Add New Application'.
- Search input fields: 'Student Name', 'Parent/Carer Name', and 'Student DOB: (dd/mm/yyyy)' with a calendar icon.
- Additional search fields: 'Start Date: (dd/mm)' and 'End Date: (dd/mm)' with calendar icons, followed by a date format mask '____-____-____'.
- Search controls: 'More Options', 'Search by Student', 'Clear Search', and a blue 'Search' button.
- Table header: A table with columns: Student Name, Parent/Carer, Start Date, End Date, Claim Status, Student Address, Student DOB, Student NCY, Carer NI Number, Carer DOB, Fund Type, and Status.

2. Enter your search criteria.

To search using more specific student or application details, click the **More Options** hyperlink to display the **More Search Options** dialog.

The 'More Search Options' dialog box is titled 'More Search Options' and contains three sections: 'Student', 'Parent/Carer', and 'Application'. The 'Student' section has fields for Gender (dropdown), Student ID, Postcode, and Base Name. The 'Parent/Carer' section has fields for Gender (dropdown) and Postcode. The 'Application' section has fields for Claim Status (dropdown), Authorise Status (dropdown), and Portal Reference Number. There are 'Close', 'Clear Search', and 'Search' buttons at the bottom.

3. Click the **Search** button to display a list of applications that match the entered search criteria.

The screenshot shows the 'Applications' page with search criteria: Student Name 'brown' and Student DOB '(dd/mm/yyyy)'. The search results table is as follows:

Student Name	Parent/Carer	Start Date	End Date	Claim Status	Student Address	Student DOB	Student NCY	Carer NI Number	Carer DOB	Fund Type	Status
B...	Br...	01/02/2017	01/01/2030	Current	6 L Jul	01	0		05	Free School Meals Fund	Authorised
H...	Br...	01/02/2017	01/01/2030	Current	6 L Jul	02	-1		05	Free School Meals Fund	Authorised
W...	Br...	01/02/2017	01/01/2030	Current	6 L Jul	01	-1		05	Free School Meals Fund	Authorised
D...	Br...	16/01/2014	18/10/2014	Current	11 Alc	09	0		23	Reject claim for Clothing	Authorised
F...	Br...	13/01/2014	04/07/2014	Current	19 Ink	28	4		26	Reject claim for Clothing	Authorised
H...	Br...	12/01/2014	01/10/2014	Current	9 V Br SA	04	4		30	Reject claim for Clothing	Authorised
U...	Br...	12/01/2014	11/07/2014	Current	6 S Alc 2C	11	10		24	Reject claim for Clothing	Authorised
W...	Br...	12/01/2014	06/09/2014	Current	24 Asi	16	9	Y2464646A	26	Reject claim for Clothing	Authorised
B...	Br...	11/01/2014	20/07/2014	Current	1 F Maf	06	-3		03	Reject claim for Clothing	Authorised
D...	Br...	11/01/2014	08/09/2014	Current	15 Ink GB	22	12		04	Reject claim for Clothing	Authorised
M...	Br...	09/01/2014	25/06/2014	Current	14 Alc 1D	07	8		18	Reject claim for Clothing	Authorised
C...	Br...	08/01/2014	24/09/2014	Current	18 Ink	29	5		12	Reject claim for Clothing	Authorised
C...	Br...	07/01/2014	15/05/2014	Current	4 L Ect	29	8		15	Reject claim for Clothing	Authorised

4. Click the required application to display the application details.

Viewing All Applications for a Student

You can quickly view a list of all the applications for a student via the **Search by Student** hyperlink, located on the main G&B **Applications** search page.

1. From within the **Applications** area, select the **G&B** page.

The screenshot shows the 'Applications' page with the 'G&B' page selected. The search criteria are Student Name and Parent/Carer Name. The 'Search by Student' link is highlighted in blue. The search results table is currently empty.

Creating a New Grants and Benefits Application

- Click the **Search by Student** hyperlink to display the **Select Student** dialog.

Student Name	Chosen Name	Given Name	Middle Name	UPN	Base Name	Student Id	Postcode	NCY
--------------	-------------	------------	-------------	-----	-----------	------------	----------	-----

- Enter the required search criteria, then click the **Search** button to display a list of students who match the search criteria.
- Select the check box for the student whose existing applications you want to view.

69 Students matching "smith, Active People"

Student Name	Chosen Name	Given Name	Middle Name	UPN	Base Name	Student Id	Postcode	NCY
<input type="checkbox"/>							11	
<input type="checkbox"/>							11	
<input type="checkbox"/>							8	
<input checked="" type="checkbox"/>							10	
<input type="checkbox"/>							3	
<input type="checkbox"/>							9	

- Click the **Select** button to display a summary of the student's details.

6. Click the **Search** button to display the claims currently associated with the student.

Student Name	Parent/Carer	Start Date	End Date	Claim Status	Student Address	Student DOB	Student NCY	Carer NI Number	Carer DOB	Fund Type	Status
B...	Br...	13/...	21/...	Current	The Cow Pens, Be...	10/...	1	P...	06/...	Post-16 Fund	Pending
B...	Br...	13/...	12/...	Current	The Cow Pens, Be...	10/...	1	P...	06/...	Free School Meals Fund	Authorised

If there is only one application associated with the student, then this application is opened automatically. Otherwise, click on the required application in the list to display the full details.

Updating Parental Responsibility

G&B can use the Eligibility Checking Service (ECS) provided by the DfE to check a student's Free Schools Meals (FSM) eligibility instantly. However, the service can only be used if the parent/carers attached to the application has parental responsibility, which is indicated by selecting the **Parental Responsibility** check box.

If required, the **Parental Responsibility** check box can be selected after the application is created.

Creating a New Grants and Benefits Application

To update parental responsibility for a student with an existing application:

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 44.

The screenshot shows the 'View Student Details' page in the Grants and Benefits system. The top navigation bar includes 'One Home', 'Applications', 'Employer', 'Chaperone', 'Reports', 'Batch Processing', and 'Administration'. The user is logged in as 'SYSADMIN'. The page displays student information such as DOB, NCY, Registered Base, and Address. It also shows parent/carer details like NI Number, Asylum Seeker status, and NASS Number. A 'Claim Details' section is visible, showing fields for Claim Item, Area, DWP Office, Start Date, Claim Cost, Fund, Officer, Received Date, End Date, Claim Status, Social Services, Portal Reference, Review Date, and Serial Number. There are buttons for 'Edit', 'ECS History', 'ECS Validation', 'Update Cost', 'Claim by Parent/Carer', 'Delete Application', and 'Back to Application Search'.

2. Click the **View/Parent/Carer Details** hyperlink to display the parent/carer details.

The screenshot shows the 'View/Parent/Carer Details' page in the Grants and Benefits system. The top navigation bar is the same as in the previous screenshot. The page displays parent/carer information such as Forename (Julianne), Surname (Vincent), Address, Phone, Active status, and Email. It also shows 'No. of Dependents : 2' and 'No. of Claims : 2'. A 'Person and Ethnic Details' section is visible, showing fields for Ethnic Origin, Home Language, Reference, Asylum Seeker, NASS Number, NI Number, and Active status. There is also an 'Impairments' section with fields for Registered Disabled, Disability Number, Day to Day Impairment, and View Current Disabilities Only (checked). There are buttons for 'Edit Person Details', 'Back to Application', 'Alert', 'More options...', 'UDF', 'Memo', and 'Notes'.

3. Select the **Dependents** tab to display a list of dependents.

The screenshot shows the 'CIEE G&B' application interface. At the top, there is a navigation bar with 'Applications' highlighted. Below it, the user's profile is displayed: Forename: Julianne, Surname: Vincent, Address: 13 [redacted], Phone: [redacted], Active: Yes, Email: [redacted], No. of Dependants: 2, No. of Claims: 2. A 'UDF' link is visible. Below the profile, there are tabs for 'Basic Details', 'Dependants', 'Department Work Pensions And Eligibility Check', 'Claim Details', 'Contact Details', and 'Address'. The 'Dependant Details' tab is active, showing a table of dependants:

Dependant Name	Parental Responsibility	Relationship To Dependant	Date of Birth
B [redacted]	No	Aunt	12 [redacted]
C [redacted]	Yes	Mother	20 [redacted]

Below the table, there is a 'Set Address' link.

In this example, the parent/carer does not have parental responsibility for the first dependent listed.

- Click the name of the dependant for whom you want to add parental responsibility. The details of the student are displayed.

The screenshot shows a window titled 'B [redacted] / 12 [redacted]' with a search icon and a close button. The window contains several tabs: 'Student Basic Details', 'Special Needs', 'Student Additional', 'Student History', 'Carers', 'Public Care', and 'Contacts'. The 'Student Basic Details' tab is active, showing the following information:

- Student Profile** (Edit): Active: Yes, Inactive Reason: -, Inactive Date: -, NCY (incl offset): [redacted], Offset: 0, Not following NCY: No, Age on 01/09/2017: [redacted], Unique Learner Number: -, Last Updated By: System Administrator, Last Updated Date: 12/07/2013 11:53:20.
- Addressee** (Edit): Addressee: Parent/Carer of Browne.
- Language Details** (Edit): Home Language: -, First Language: -, EAL: No.
- Ethnicity, Religion and Culture** (Edit): Nationality(if not British): -, Country of Origin: -, Student Ethnicity: WOTH - Any other White backgro, Ethnic Source: -, Religion: -, Culture: -.

Links for 'Open All' and 'Close All' are visible at the top right of the content area, and a 'Close' link is at the bottom right.

- Select the **Carers** tab.

Creating a New Grants and Benefits Application

Student Basic Details | Special Needs | Student Additional | Student History | Carers | Public Care | Contacts

▼ Carer Details + Add

1 Carer

Carers Name	Parental Responsibility	Financial Responsibility	Relationship	Contact Order	Active Claims
J	No	No	Aunt	0	Delete

[Edit](#) [Set Address](#) [View Dependants](#) [UDF](#)

Title: Carer Name: J

Parental Responsibility: No Financial Responsibility: No

Relationship: Aunt Contact Order:

Carer Address: 13 Total Claims: 0

Close

6. Click the **Edit** hyperlink to enable editing.

Student Basic Details | Special Needs | Student Additional | Student History | Carers | Public Care | Contacts

▼ Carer Details + Add

1 Carer

Carers Name	Parental Responsibility	Financial Responsibility	Relationship	Contact Order	Active Claims
J	<input type="checkbox"/>	<input type="checkbox"/>	AUN	Contact Order	Delete

[Edit](#) [Set Address](#) [View Dependants](#) [UDF](#)

Title: Carer Name: J

Parental Responsibility: Financial Responsibility:

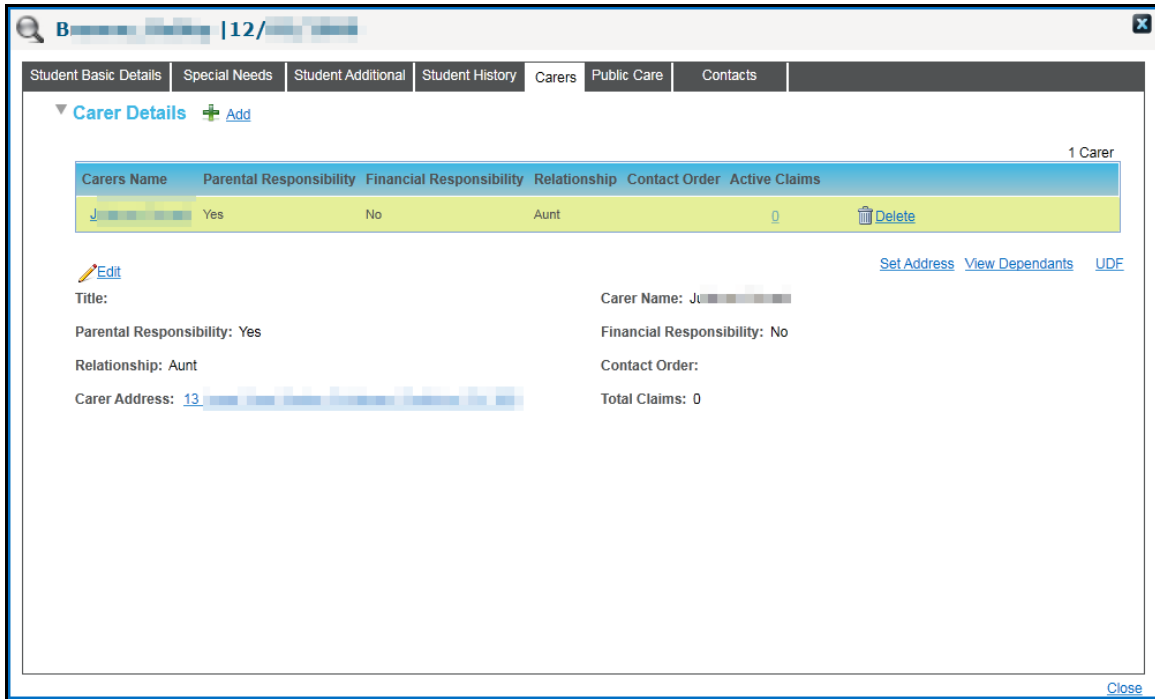
Relationship: AUN Contact Order:

Carer Address: 13 Total Claims: 0

Cancel Save

Close

7. Select the **Parental Responsibility** check box.
8. Click the **Save** button to record the change.



9. Click the **X** button to close the dialog.

If you want to run the ECS check now, click the **Back to Application** hyperlink and run the check.

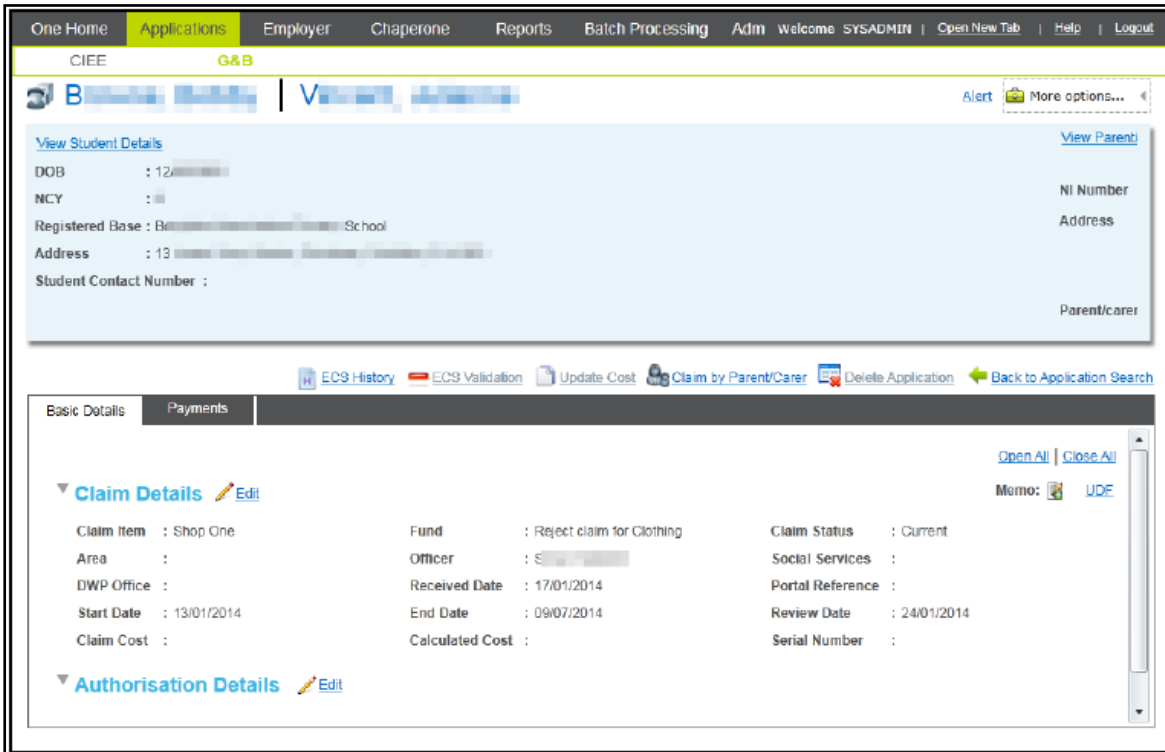
Editing National Insurance Number and Asylum Seeker Details

To edit the National Insurance number or asylum seeker details for a parent or carer:

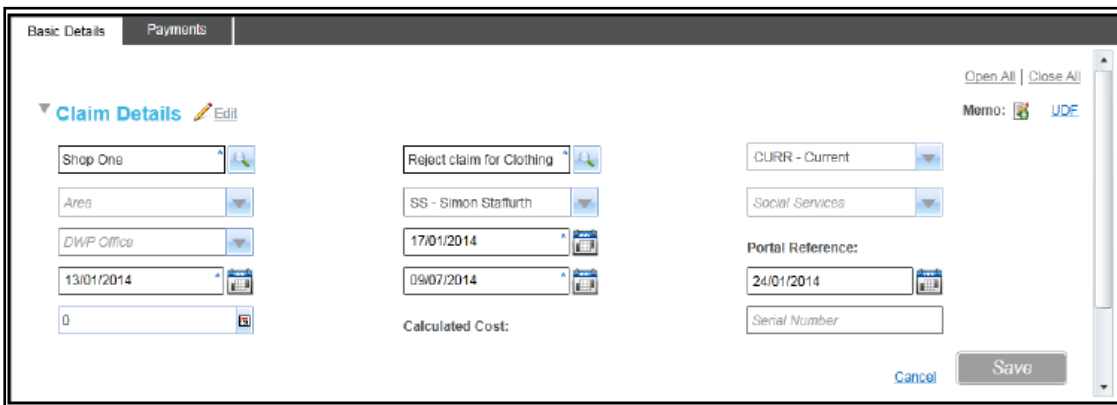
1. Open the required application. For more information, see [Opening an Existing Application](#) on page 44.
2. Click the **Edit NINumber / AsylumSeeker** hyperlink to enable editing.
3. Enter the **NI Number**.
4. If required, select the **Asylum Seeker** check box.
5. Click the **Save** button.

Editing Claim Details

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 44.



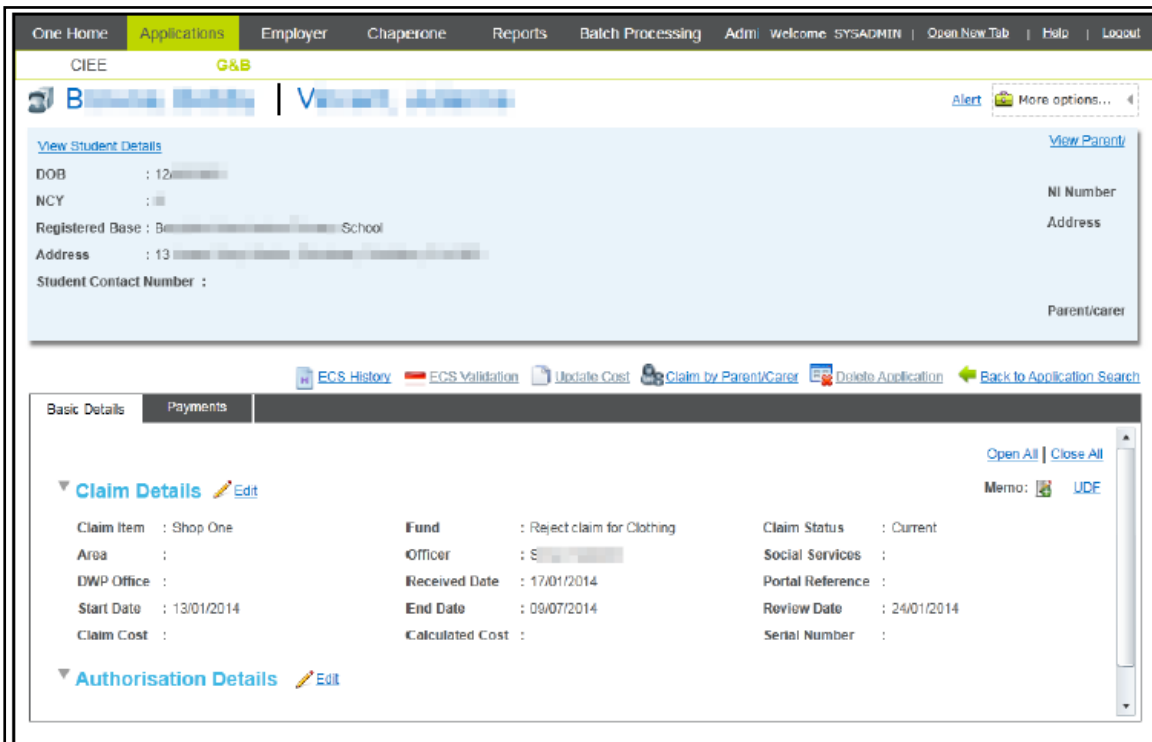
2. Click the **Edit** hyperlink for the **Claim Details** section to display editable fields relating to the application details.



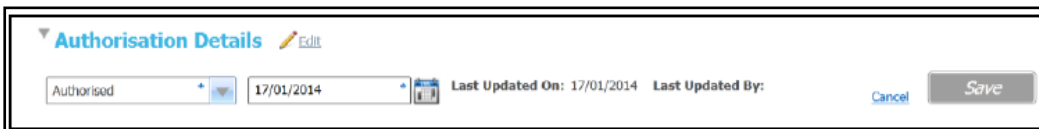
3. Make the required changes to the application details.
4. Click the **Save** button.

Editing Authorisation Status

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 44.



2. Click the **Edit** hyperlink for the **Authorisation Details** section to display the editable fields relating to authorisation details.



3. Select the required **Status**. If you change the status to **Rejected** and the parent/carer associated with the current application has other active applications, you are asked if you want to reject the other active applications as well.

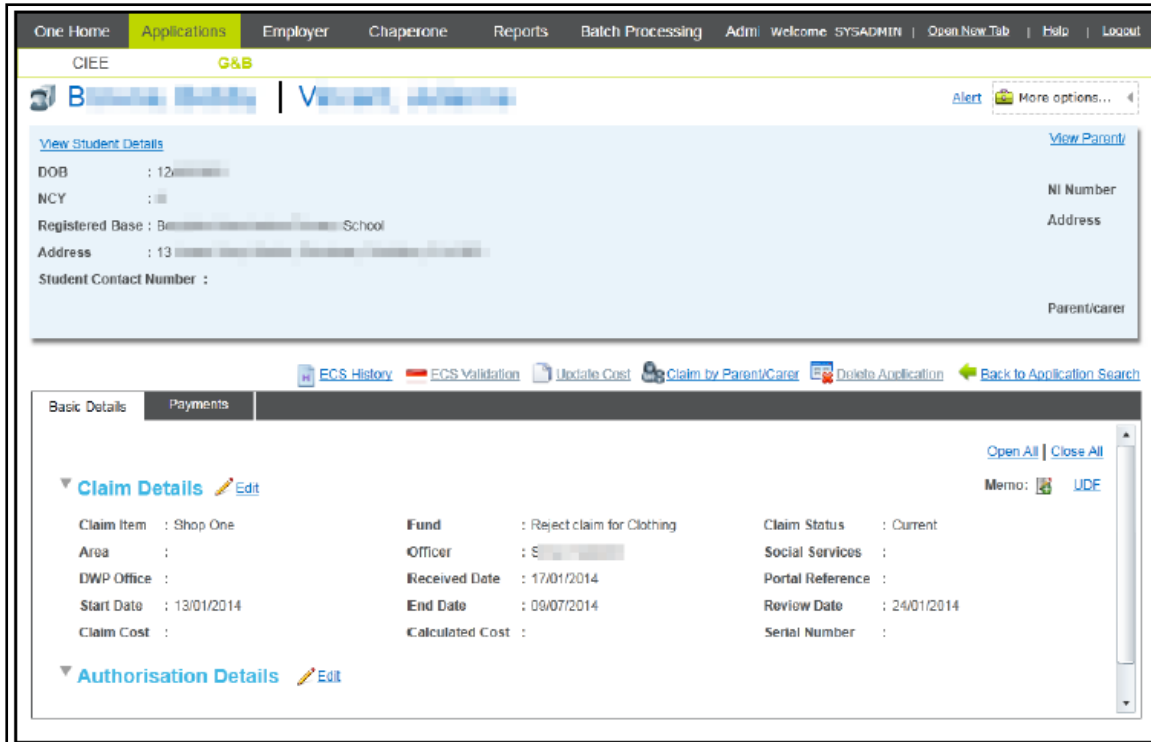
TIP: If you choose to reject the other applications associated with the carer and you edited the **End Date** or **Claim status** of the first application, then the updated details are applied to all rejected applications.

4. Click the **Save** button.

Deleting an Existing Application

A G&B application can be deleted if the **Status** of the application (as recorded in the **Basic Details** tab) is either **Rejected** or **Pending**. Applications with a **Status** of **Authorised** cannot be deleted.

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 44.



2. Click the **Delete Application** hyperlink to display the **Delete Application** confirmation dialog.
3. Click the **Yes** button delete the application. When the application is deleted, a confirmation message is displayed.
4. Click the **OK** button.

More Information:

[Editing Authorisation Status](#) on page 53

Recording Payment Details

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 44.

The screenshot shows a web application interface with a navigation bar at the top containing 'One Home', 'Applications', 'Employer', 'Chaperone', 'Reports', 'Batch Processing', 'Adm', 'Welcome', 'SYSADMIN', 'Open New Tab', 'Help', and 'Logout'. Below the navigation bar, there are tabs for 'CIEE' and 'G&B'. The main content area displays student information: 'View Student Details', 'DOB : 12/...', 'NCY : ...', 'Registered Base : B... School', 'Address : 13...', and 'Student Contact Number :'. On the right side, there are links for 'View Parent/NI Number', 'Address', and 'Parent/carer'. Below this, there are several utility icons: 'ECS History', 'ECS Validation', 'Update Cost', 'Claim by Parent/Carer', 'Delete Application', and 'Back to Application Search'. The 'Payments' tab is selected, showing 'Claim Details' and 'Authorisation Details' sections. The 'Claim Details' section includes fields for 'Claim Item : Shop One', 'Fund : Reject claim for Clothing', 'Claim Status : Current', 'Area :', 'Officer : S...', 'Social Services :', 'DWP Office :', 'Received Date : 17/01/2014', 'Portal Reference :', 'Start Date : 13/01/2014', 'End Date : 09/07/2014', 'Review Date : 24/01/2014', 'Claim Cost :', 'Calculated Cost :', and 'Serial Number :'. There are also links for 'Open All', 'Close All', and 'Memo: UDF'.

2. Select the **Payments** tab.

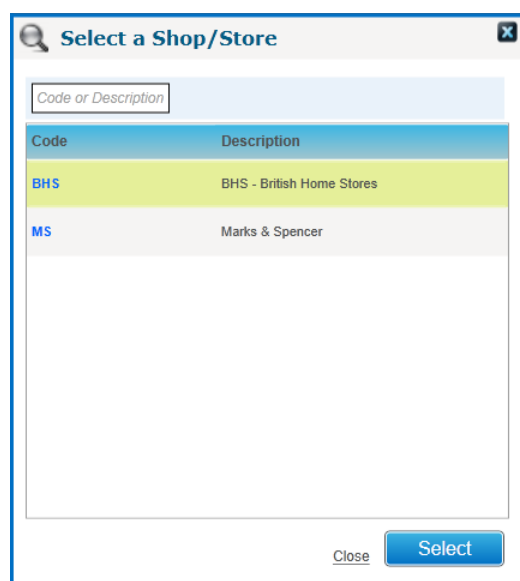
The screenshot shows the 'Payments' tab selected in the application. The main content area is titled 'Payment Details' with a '+ Add' hyperlink. The rest of the page is currently blank.

3. Click the **Add** hyperlink to display the editable fields relating to payment details.

The screenshot shows the 'Payment Details' form with the following input fields: 'Cost Centre', 'Payment Date (dd/mm/yyyy)', 'Release Date (dd/mm/yyyy)', 'Cheque Number', 'Date Cashed (dd/mm/yyyy)', 'Shop/Store', 'Invoice', 'Amount', and 'VAT'. There are 'Cancel' and 'Save' buttons at the bottom right of the form.

4. Select a **Payment Date**.
5. Click the **Shop/Store** browse button to display the **Select a Shop/Store** browser.

Creating a New Grants and Benefits Application



6. Highlight the required shop then click the **Select** button to add it to the application and close the dialog.
7. Enter an **Amount** for the payment.
8. Enter any other optional information.
9. Click the **Save** button.

Editing Payment Details

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 44.
2. Select the **Payments** tab.
3. For the payment you wish to update, click the **Edit** hyperlink to enable editing.
4. Make the required changes to the payment details.
5. Click the **Save** button.

Deleting Payment Details

1. Open the required application. For more information, see [Opening an Existing Application](#) on page 44.
2. Select the **Payments** tab.
3. For the payment you wish to remove, click the **Delete** hyperlink to display the **Delete Payment Details** confirmation dialog.
4. Click the **Yes** button to delete the payment details.

Viewing Grants and Benefits Claim Details for a Student

All the claims that a student is associated with are displayed in the **Claims Details** tab. From here, you can view a student's details or specific claim applications.

1. Open an application to which the student is associated. For more information, see [Opening an Existing Application](#) on page 44.
2. Click the **View Student Details** hyperlink to display the student's information.

3. Select the **Claim Details** tab to display the list of claims made on behalf of the student.

4. To view details of the student, click their name to display the **Person Details** dialog.
5. To view a specific application, click the required **View Application** hyperlink.

Updating a Claim Cost

The claim cost of Free School Meals item claims that have a cost defined in the default details can be calculated using the following formula:

$$\text{Claim Cost} = \text{Annual FSM cost} * (\text{Days School Open in Claim} / \text{Annual School Days})$$

If any of the variables in the formula are changed (e.g. the FSM cost changes), you can update the cost of individual claims. To update the cost of a claim:

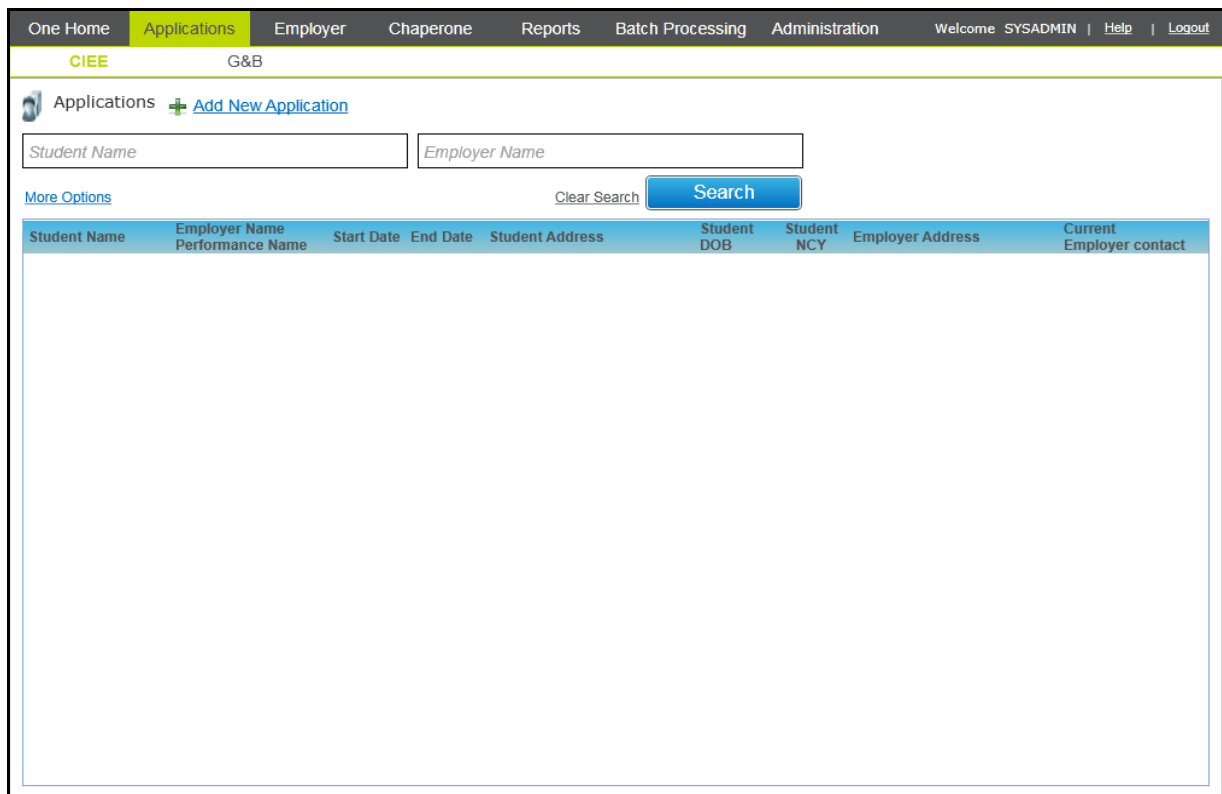
1. Open the application for a claim that needs the cost updating. For more information, see [Opening an Existing Application](#) on page 44.
2. Click the **Update Cost** hyperlink.

Batch Processing

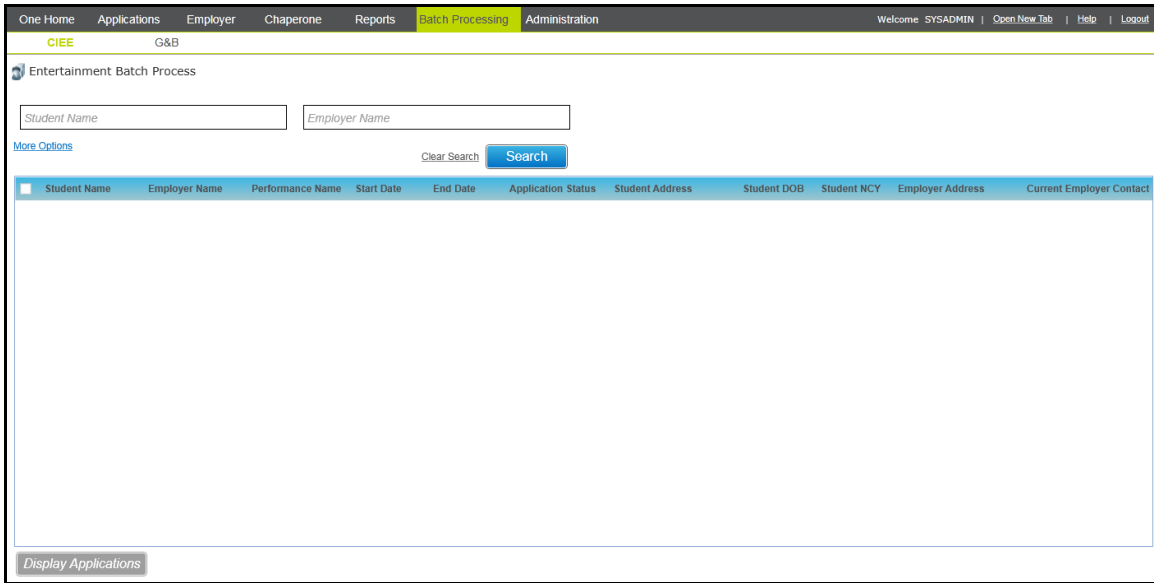
The **Batch Processing** area enables you to update the details of multiple applications at once. For example, if an officer has left, you can search for all applications connected to the officer and assign a new officer to all the affected applications. For more information on updating multiple applications at once, see [Updating Multiple Applications via Batch Processing](#) on page 58.

Updating Multiple Applications via Batch Processing

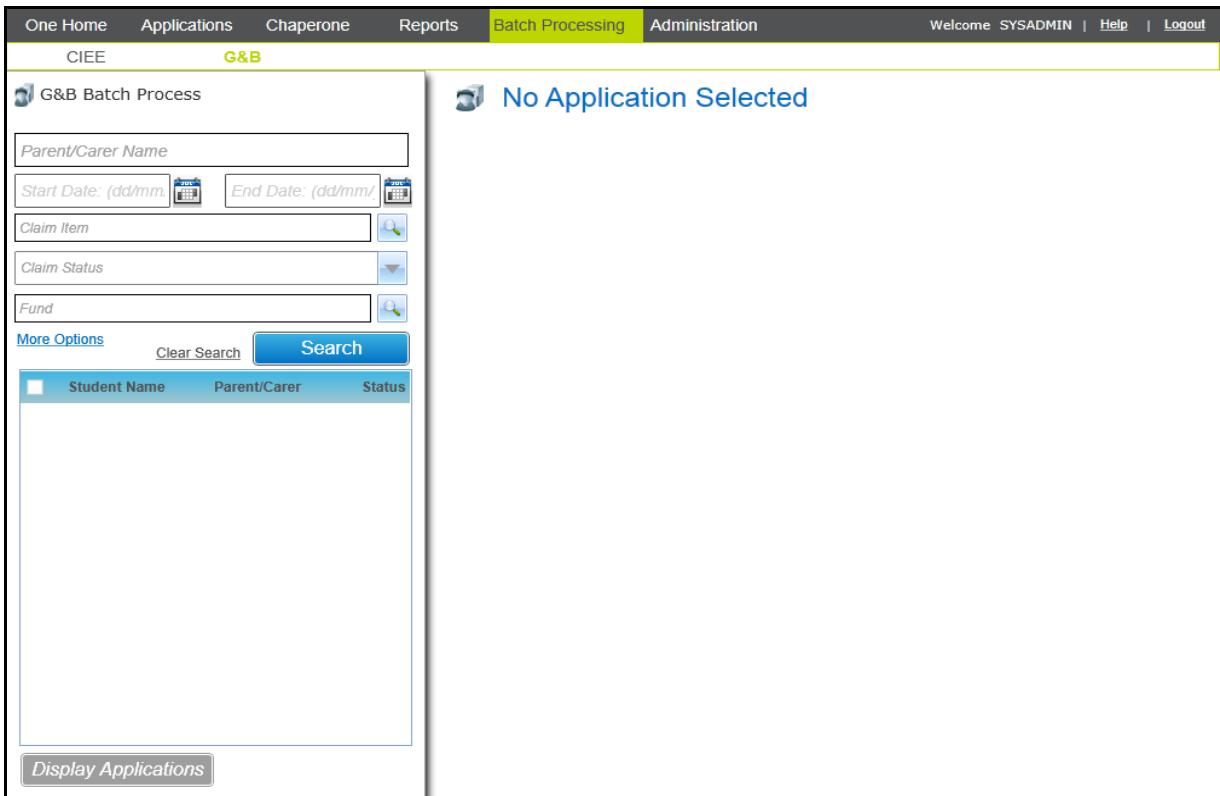
1. From the One homepage, click the **Applications** button to display the **Applications** area.



2. Select the **Batch Processing** area.



3. Select the **G&B** page.



4. Enter the search criteria for the applications you wish to edit.
5. To search using more specific application details, click the **More Options** hyperlink to display the **More Search Options** dialog.

Creating a New Grants and Benefits Application

More Search Options

Review Date
From Date [calendar icon] To Date [calendar icon]

Authorised
From Date [calendar icon] To Date [calendar icon]
Authorise Status [dropdown] Not on current school roll
Area Office [dropdown] NCY [dropdown]
DSS Office [dropdown]
Officer [dropdown]

Close Clear Search Search

- Click the **Search** button to display a list of results that match the entered search criteria.

G&B Batch Process

[Refresh Batch Process Status](#) [Error Log](#)

[Search Bar]

Start Date: (dd/mm) [calendar icon] End Date: (dd/mm) [calendar icon]

Claim Item [magnifying glass icon]

Claim Status [dropdown]

Fund [magnifying glass icon]

[More Options](#) Clear Search Search

90 Applications matching "brown"

<input type="checkbox"/>	Student Name	Parent/Carer	Status
<input type="checkbox"/>	A [redacted]	B [redacted]	Authorised
<input type="checkbox"/>	B [redacted]	B [redacted]	Authorised
<input type="checkbox"/>	B [redacted]	B [redacted]	Authorised
<input type="checkbox"/>	B [redacted]	B [redacted]	Authorised
<input type="checkbox"/>	B [redacted]	B [redacted]	Authorised
<input type="checkbox"/>	B [redacted]	B [redacted]	Authorised

Display Applications

- Select the check box for each application to which you wish to make the same change, e.g. all the applications for which you want to change the **Authorise Status**.
- Click the **Display Applications** button to display the selected applications in a grid.

IMPORTANT NOTE: Although all selected records will be updated as expected, due to performance issues, only the first 100 selected records are displayed when you click the **Display Applications** button.

Student Name	Parent/Carer	Start Date	End Date	Review Date	Authorisation Status	Claim Status
Alda, Noah	Brown, Liv	25/09/2013	04/11/2014	09/02/2014	Authorised	Current
Ball, Linda	Brown, Jim	02/11/2013	21/10/2014	02/02/2014	Authorised	Current
Birch, Christine	Brown, Burt	10/11/2013	25/10/2014	26/02/2014	Authorised	Current
Black, Alan	Brown, Kirk	14/10/2013	13/07/2014	28/03/2014	Authorised	Current

9. In the **Batch Update** section, make the required changes to the application details.

10. Click the **Process** button to display the **G&B Batch Update** confirmation dialog.
11. Click the **Yes** button to update the records and display another **G&B Batch Update** confirmation dialog.
12. Click the **OK** button to complete the process.

Checking Free School Meal Eligibility

One can use the Eligibility Checking Service (ECS) provided by the Department for Work and Pension to check if applicants are eligible to receive Free School Meals (FSM). The service takes the National Insurance (NI) number or National Asylum Support Service (NASS) number recorded for the parent/carer and checks it against the DWP eligibility database. The check can be run against a single application or against multiple applications at once via the **ECS Validation** tab in the **Administration** area.

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.

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

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**.

Eligibility Checking Service (ECS) Validation for Individual Applicants

There are two ways to check the FSM eligibility of an individual using the Eligibility Checking Service (ECS). You can run the check while creating the application or you can run it from an existing application.

When creating an application, the **ECS Validation** hyperlink becomes active as soon as the parent/carer is added to the application. However, the check will not be valid until an FSM related claim type has been assigned to the application. If the parent/carer making the application does not have parental responsibility assigned in One, then you can run the check and One will automatically assign parental responsibility.

Alternatively, you can open an existing application and click the **ECS Validation** hyperlink. If the parent/carer does not have parental responsibility assigned, then you must assign this manually before the ECS Validation link becomes active.

Creating a New Grants and Benefits Application

After clicking the link, the check is performed with the DWP against the selected parent/carer and a message is returned either confirming or denying FSM eligibility.

NOTE: When the result of the ECS check for FSM eligibility is Not Found, a qualifier code is also returned. This is stored on the FSM check record. The qualifier code is interpreted and displayed on the results model window. For more information, see [Interpreting the Qualifier Code](#) on page 64.

If you receive an error message when trying to check eligibility, see [Troubleshooting an ECS Validation Failure](#) on page 69.

More Information:

- [Opening an Existing Application](#) on page 44
- [Adding a Dependent](#) on page 70
- [Adding a New Parent/Carer to the One Database](#) on page 44
- [Updating Parental Responsibility](#) on page 47

Interpreting the Qualifier Code

When a check result for FSM comes back as Not Found, a qualifier is also returned. This code is stored on the FSM check record. In the case of an individual check, the code is interpreted as shown in the following table:

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	

Viewing Parent/Carer Eligibility Checking Service (ECS) History

You can view the ECS history of a parent/carers by opening any application associated with the required parent/carers and then clicking the **ECS History** hyperlink.

Student Name	Claim Description	Start Date	End Date	Eligibility Status	Qualifier	Process Date
Test Child11, Test Child11	General Free School Meal	21/05/2018	19/08/2018	FoundAndEligible	Manual process	23/05/2018

Eligibility Checking Service (ECS) Validation for Multiple Applications

G&B uses the ECS service to batch check the eligibility of multiple FSM applicants. The batch processing of FSM claims has three stages; submitting a batch of applications to the DWP for eligibility checking, checking the status of the checks, then updating the One database with the eligibility information provided by the DWP.

NOTE: When the result of an ECS check is *Not Found*, a qualifier code is also returned. This is stored on the individual FSM check record.

When an ECS batch process is run, it selects automatically all the claims currently recorded in the One database that meet the following criteria:

- A parent/carers is included in the claim.
- The **Claim Code** starts with 'FSM'.
- The **Claim Status** is either **Current** or **Pending** (a batch can include either current or pending applications, or both).

One then performs additional validation checks before sending an application to the DWP. One verifies that any applications also contain the following information regarding the parent/carers:

- Surname
- Date of Birth
- National Insurance (NI) number or National Asylum Support Service (NASS) number

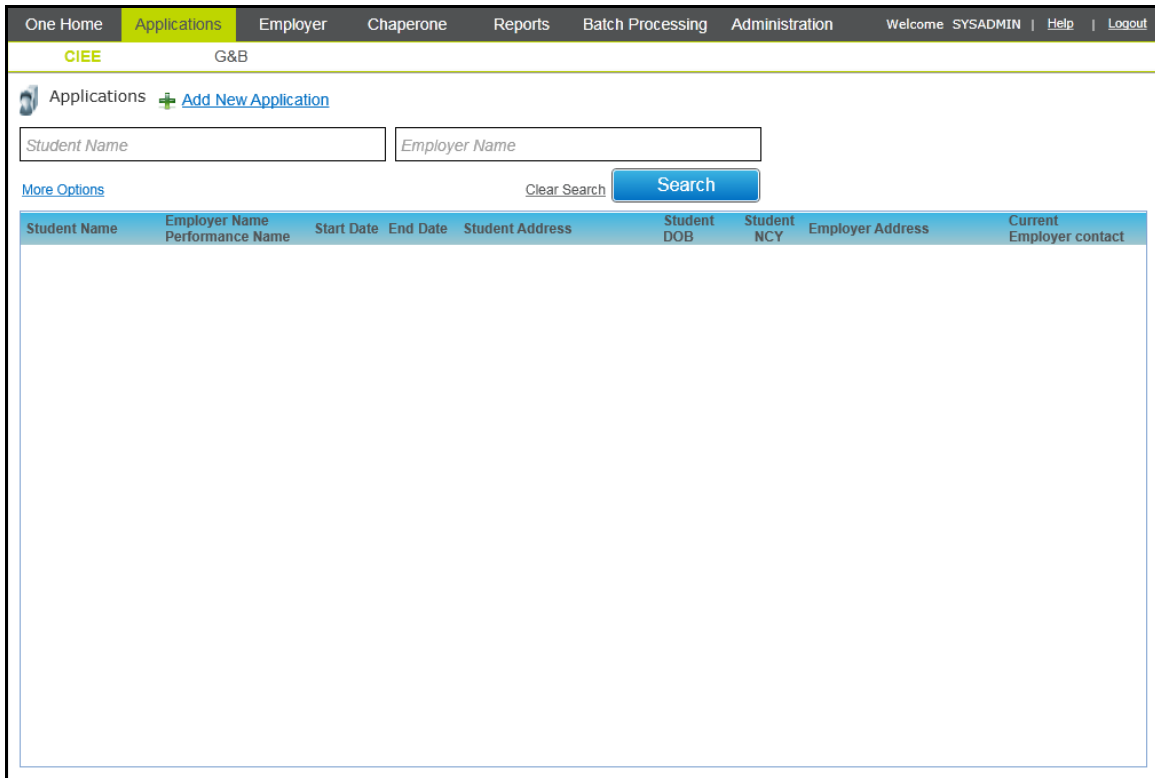
One does not submit applications without all this information to the DWP as they would be rejected as invalid claims.

After a batch of applications is sent to and processed by the DWP, the returned records must be incorporated into the One database.

To submit multiple applications to the ECS service for FSM checking, complete the following procedure:

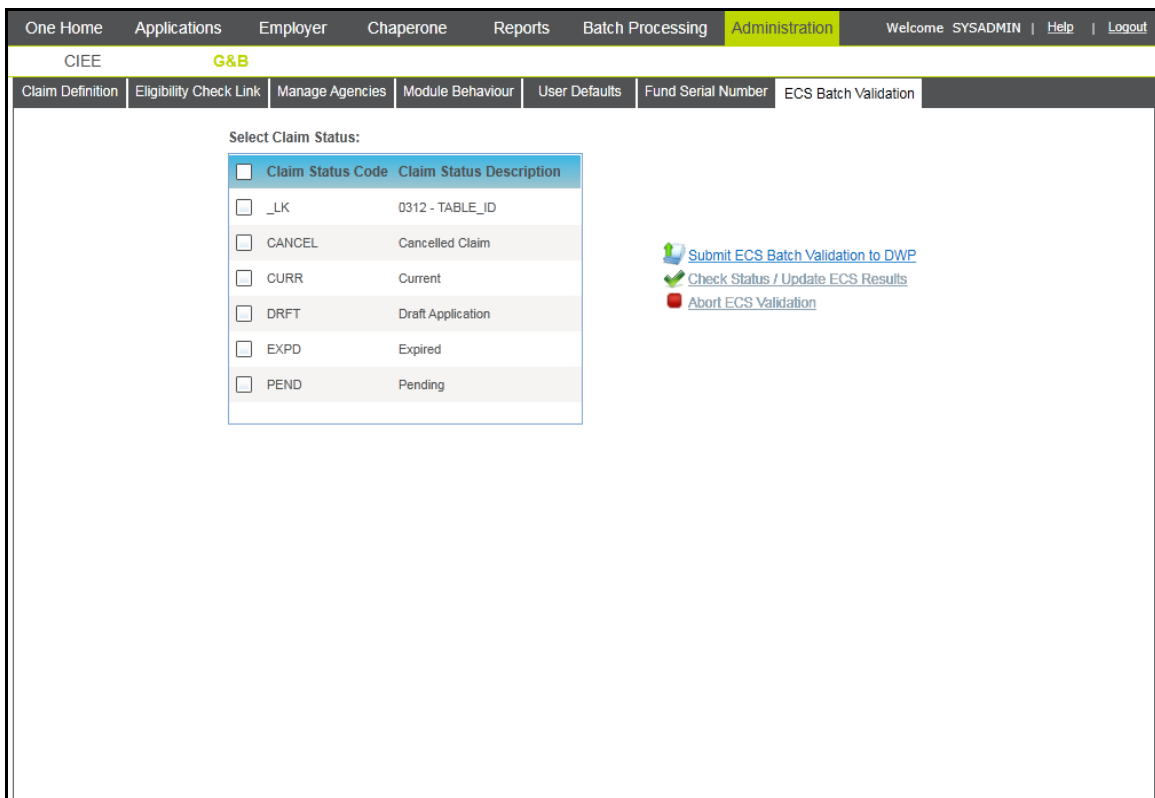
Creating a New Grants and Benefits Application

1. From the One homepage, click the **Applications** button to display the **Applications** area.



The screenshot shows the 'Applications' page. At the top, there is a navigation bar with 'Applications' highlighted. Below the navigation bar, there is a search area with two input fields: 'Student Name' and 'Employer Name'. To the right of these fields is a 'Search' button. Below the search area, there is a table with the following columns: Student Name, Employer Name Performance Name, Start Date, End Date, Student Address, Student DOB, Student NCY, Employer Address, and Current Employer contact. The table is currently empty.

2. Select the **Administration** area.
3. Select the **ECS Batch Validation** tab.



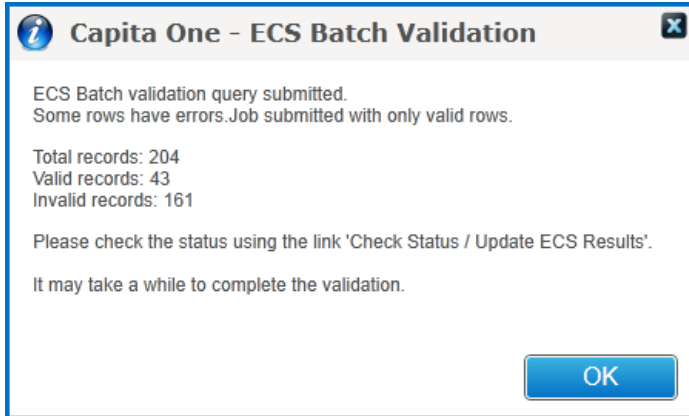
The screenshot shows the 'Administration' page. At the top, there is a navigation bar with 'Administration' highlighted. Below the navigation bar, there is a sub-navigation bar with several tabs: 'Claim Definition', 'Eligibility Check Link', 'Manage Agencies', 'Module Behaviour', 'User Defaults', 'Fund Serial Number', and 'ECS Batch Validation'. The 'ECS Batch Validation' tab is selected. The main content area shows a 'Select Claim Status:' section with a table of claim status codes and descriptions. To the right of the table, there are three buttons: 'Submit ECS Batch Validation to DWP', 'Check Status / Update ECS Results', and 'Abort ECS Validation'.

Claim Status Code	Claim Status Description
<input type="checkbox"/> _LK	0312 - TABLE_ID
<input type="checkbox"/> CANCEL	Cancelled Claim
<input type="checkbox"/> CURR	Current
<input type="checkbox"/> DRFT	Draft Application
<input type="checkbox"/> EXPD	Expired
<input type="checkbox"/> PEND	Pending

4. Select the check box for the types of claims you wish to process.

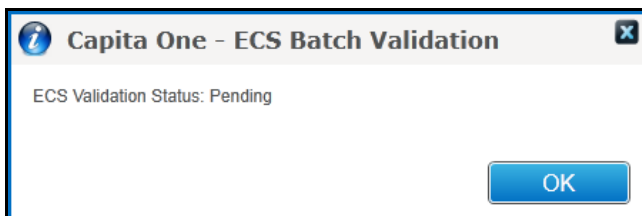
- Click the **Submit ECS Batch Validation to DWP** hyperlink to display the **ECS Batch Validation** dialog.
- Click the **Yes** button to start the local validation of applications.

After the validation is complete, another **Capita One – ECS Batch Validation** dialog is displayed. This details the number of records that are in a valid format and how many are in an invalid format.



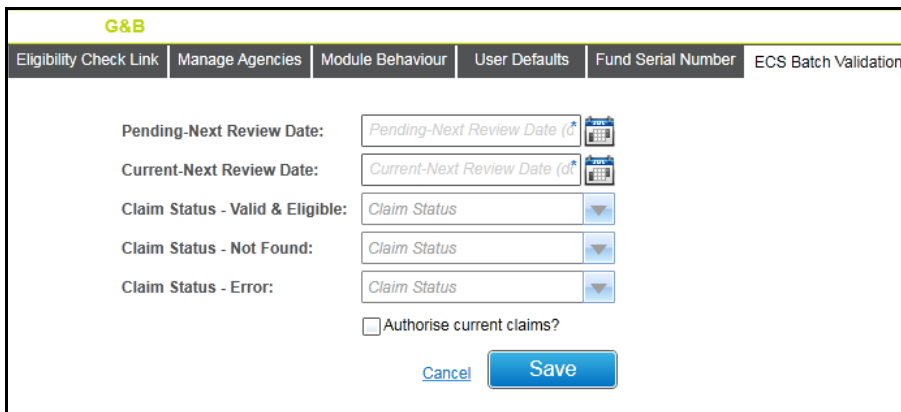
- Click the **OK** button to send the applications to the DWP and start the ECS checks. After submission, the **Check Status / Update ECS Results** hyperlink becomes active. If you receive an error message when trying to check eligibility, see *Troubleshooting an ECS Validation Failure* on page 69.

- Click the **Check Status / Update ECS Results** hyperlink to view the progress of the checks. If the DWP has not finished processing the records, the current status of the ECS batch submission is displayed:



NOTE: There is no indication of the progress of the validation and there is no automatic notification when the process is complete. Therefore, you should click the **Check/Status/Update ECS Results** hyperlink periodically until the status is returned as **Complete**.

If **ECS Validation Status** is **Complete**, after you click the **OK** button then you are presented with blank fields for new review dates.



Creating a New Grants and Benefits Application

You now must save the results of the ECS check to the One database.

9. Enter a **Pending – Next Review Date**.

When saved, this will update any records that were found to be ineligible for FSM with the entered review date. If left blank, the existing review date for the ineligible records is unchanged.

10. Enter a **Current – Next Review Date**.

When saved, this will update any records that were found to be eligible for FSM with the entered review date. If left blank, the existing review date for the eligible records are unchanged.

11. If required, select the claim status you want to assign to each type of processed claim. The DWP categorises processed claims into three categories, **Valid & Eligible**, **Not Found** and **Error**.

12. To update the authorisation status of all eligible records to Authorised, select the **Authorise current claims?** check box.

13. Click the **Save** button to display the **ECS Batch Validation** dialog.

14. Click the **Yes** button to display a confirmation dialog.

15. Click the **OK** button.

Aborting an ECS Validation

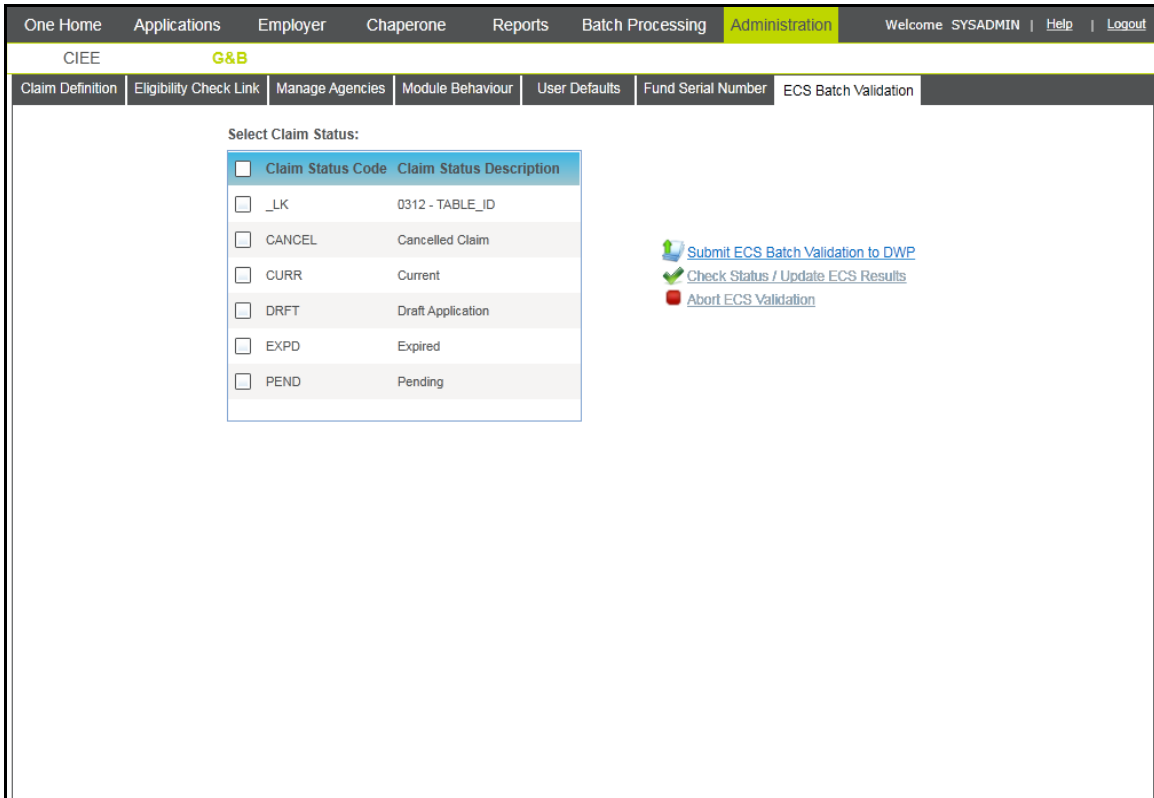
If after submitting the records to the DWP you need to stop the processing of the claims, you must abort the validation.

1. From the One homepage, click the **Applications** button to display the **Applications** area.

The screenshot shows the 'Applications' page in the One system. The navigation menu at the top includes 'One Home', 'Applications' (highlighted), 'Employer', 'Chaperone', 'Reports', 'Batch Processing', and 'Administration'. The user is logged in as 'SYSADMIN'. The page content includes a search bar with 'Student Name' and 'Employer Name' fields, a 'Search' button, and a table with the following columns: Student Name, Employer Name Performance Name, Start Date, End Date, Student Address, Student DOB, Student NCY, Employer Address, and Current Employer contact.

2. Select the **Administration** area.

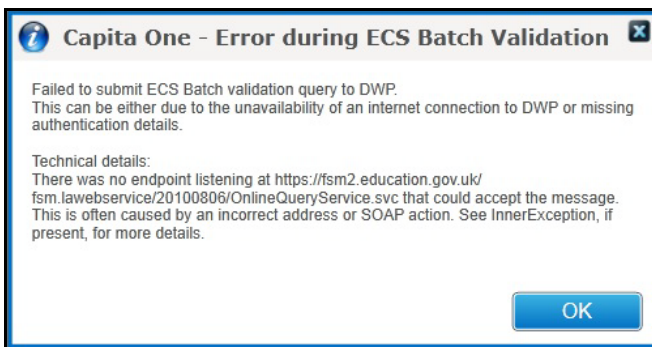
3. Select the **ECS Batch Validation** tab.



4. Click the **Abort ECS Validation** hyperlink to display a confirmation dialog.
5. Click the **Yes** button to cancel the validation. You can now submit a new ECS batch validation job to the DWP.

Troubleshooting an ECS Validation Failure

If G&B cannot connect to the ECS Validation service at the DWP, an error message, similar to the following graphic, is displayed:



Generally, these errors can be resolved by checking the following:

- Ensure that the system you are connecting from has access to the Internet and is not being blocked by a firewall or proxy.
- Ensure that ECS related details entered on the **Applications | Administration | Module Behaviour Options** tab are entered correctly.

05 | Maintaining Parent/Carer Details

Introduction

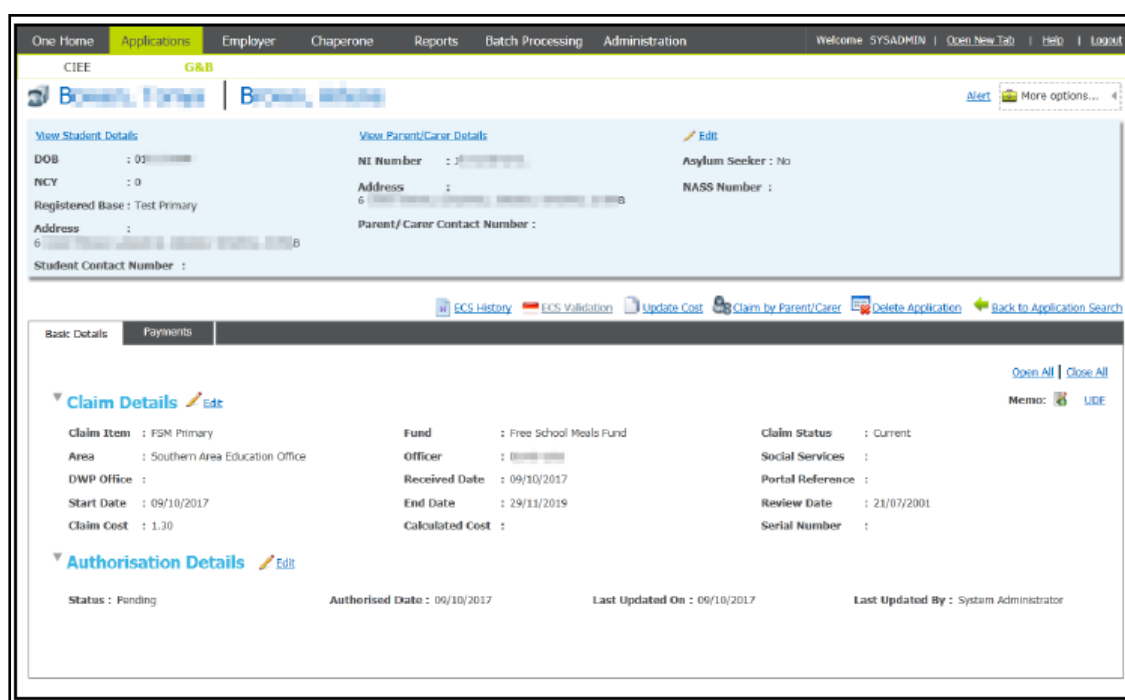
Given the types of checks that can be run in G&B, it is important that the details of the parent and carer making claims are kept current. You can maintain information about a parent or carer's basic details, dependents, the benefits they receive and you can view the claims they have made.

Adding a Dependent

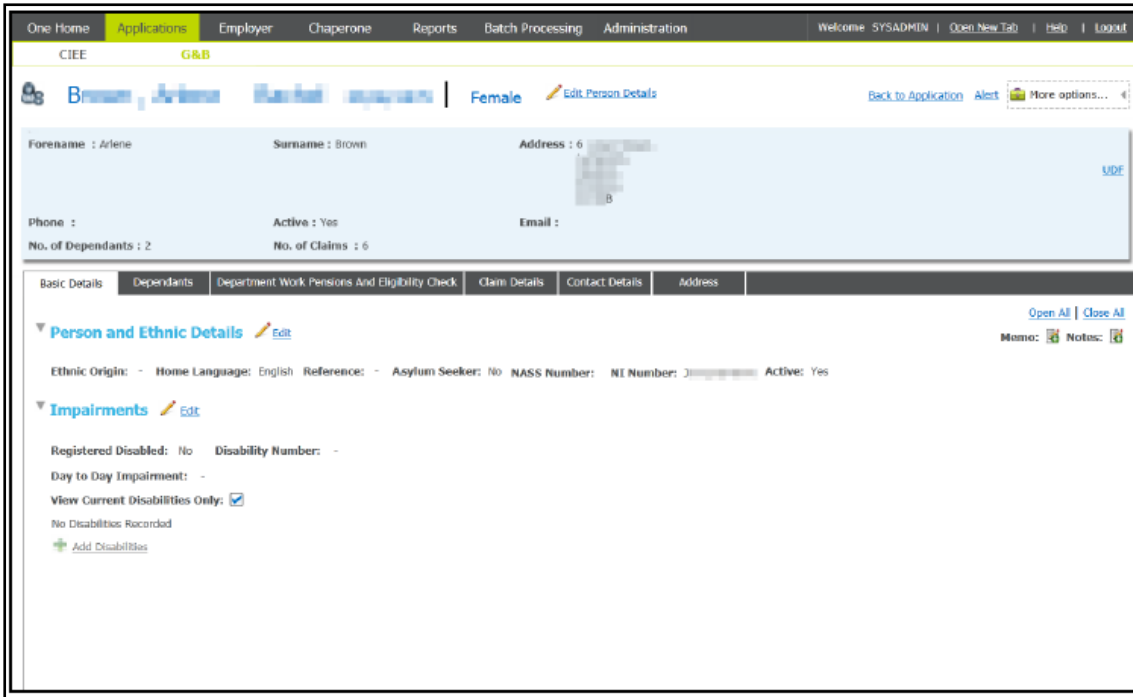
In order for a person to be added as a parent or carer to a claim application, the student associated with the claim must be a dependent. Although the association can be made between a student and a parent/carers when creating a new application, students can also be added as a dependent beforehand via the **Dependents** tab. Once added as a dependent, the parent/carers is available for selection in the **Select Parent/Carer** dialog for that student.

In order to use the ECS functionality to verify FSM eligibility for a student, you must select the **Parental Responsibility** check box when adding the student as a dependent of the parent/carers.

1. Open an application with which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 44.



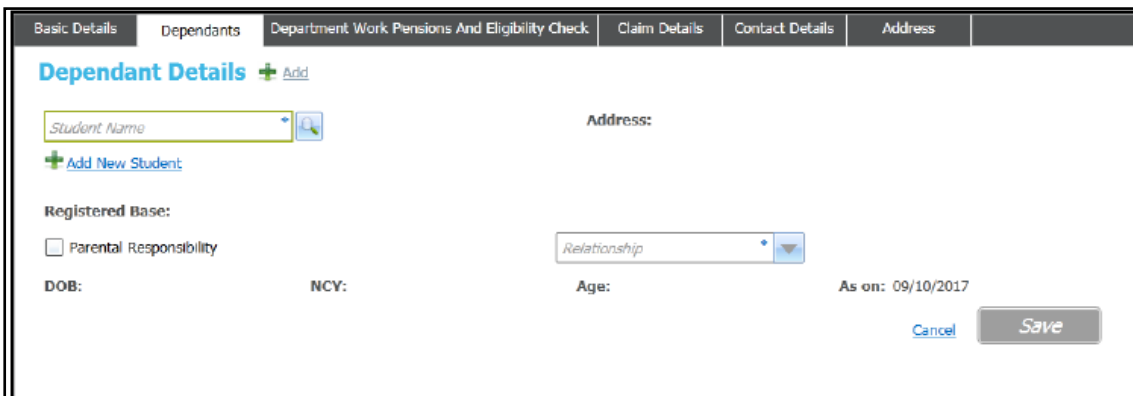
2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.



3. Select the **Dependants** tab.



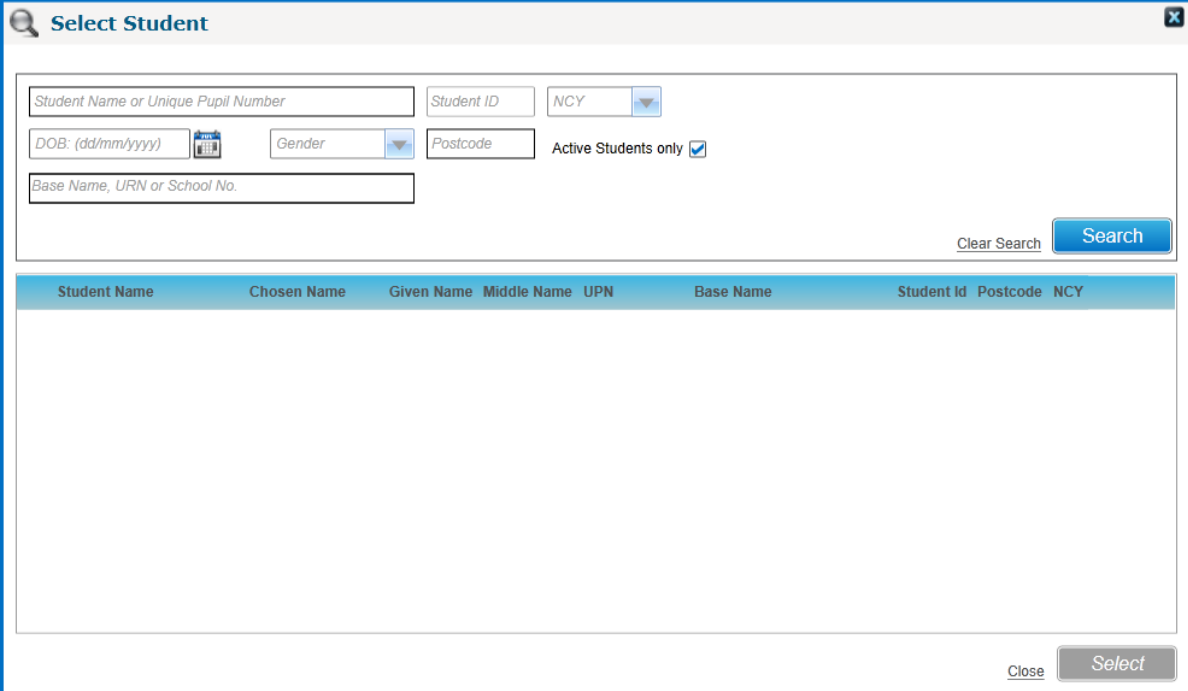
4. Click the **Add** hyperlink to display the editable fields relating to dependant details.



5. Click the **Student Name** browse button to display the **Select Student** browser.

NOTE: If you know the student is not already in the One database, click the **Add New Student** hyperlink to add a new student. For more information see, [Adding a New Student to the One Database](#) on page 44.

Maintaining Parent/Carer Details



The screenshot shows the 'Select Student' form with the following fields and values:

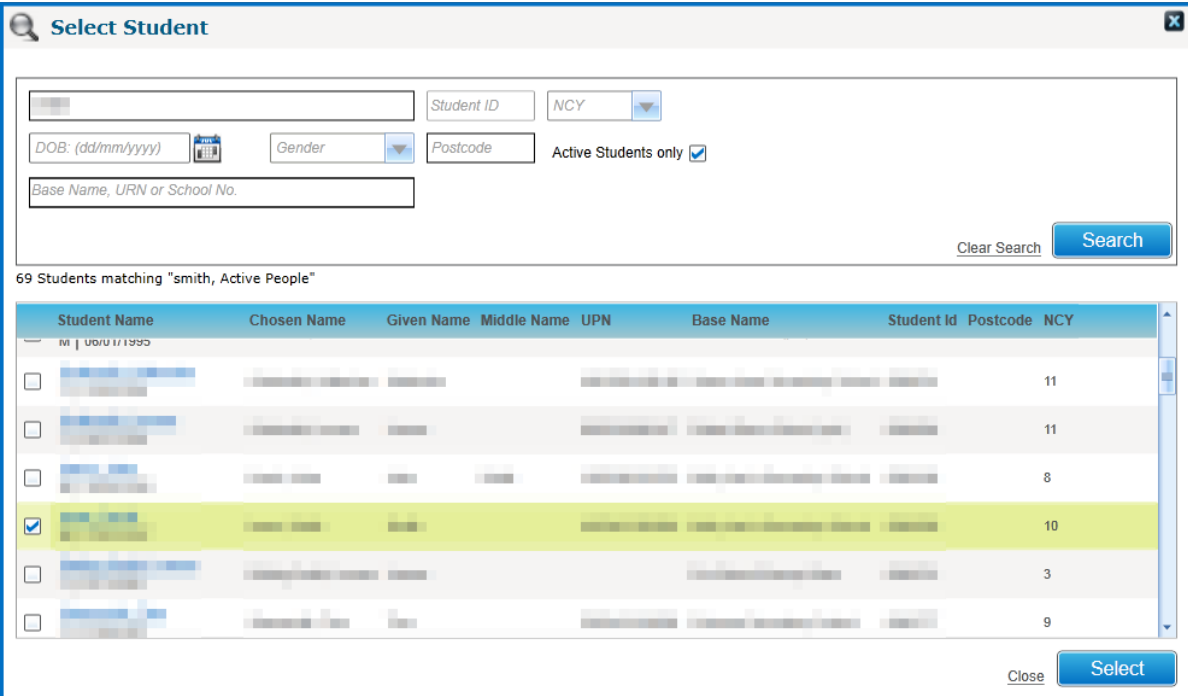
- Student Name or Unique Pupil Number: [Empty]
- Student ID: [Empty]
- NCY: [Dropdown menu]
- DOB: (dd/mm/yyyy): [Empty]
- Gender: [Dropdown menu]
- Postcode: [Empty]
- Active Students only:
- Base Name, URN or School No.: [Empty]

Buttons: Clear Search, Search

Student Name	Chosen Name	Given Name	Middle Name	UPN	Base Name	Student Id	Postcode	NCY
--------------	-------------	------------	-------------	-----	-----------	------------	----------	-----

Buttons: Close, Select

- Enter the required search criteria then click the **Search** button to display a list of students who match the search criteria.



The screenshot shows the 'Select Student' form with search results displayed. The search criteria are: Student Name: [Empty], Student ID: [Empty], NCY: [Dropdown menu], DOB: (dd/mm/yyyy): [Empty], Gender: [Dropdown menu], Postcode: [Empty], Active Students only: , Base Name, URN or School No.: [Empty].

Buttons: Clear Search, Search

69 Students matching "smith, Active People"

Student Name	Chosen Name	Given Name	Middle Name	UPN	Base Name	Student Id	Postcode	NCY
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	11
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	11
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	8
<input checked="" type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	10
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	3
<input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	9

Buttons: Close, Select

- Select the check box adjacent to the student you wish to add as a dependent then click the **Select** button to add them and close the browser.

The screenshot shows the 'Dependant Details' form with the following fields and values:

- Name:** B [redacted]
- Address:** 6 [redacted] B
- Registered Base:** Test Primary
- Parental Responsibility:**
- DOB:** 01/[redacted]
- NCY:** 0
- Age:** [redacted]
- Relationship:** [drop-down menu]
- As on:** 09/10/2017

8. Select the **Relationship** from the drop-down list.
9. If required, select the **Parental Responsibility** check box.
10. Click the **Save** button.

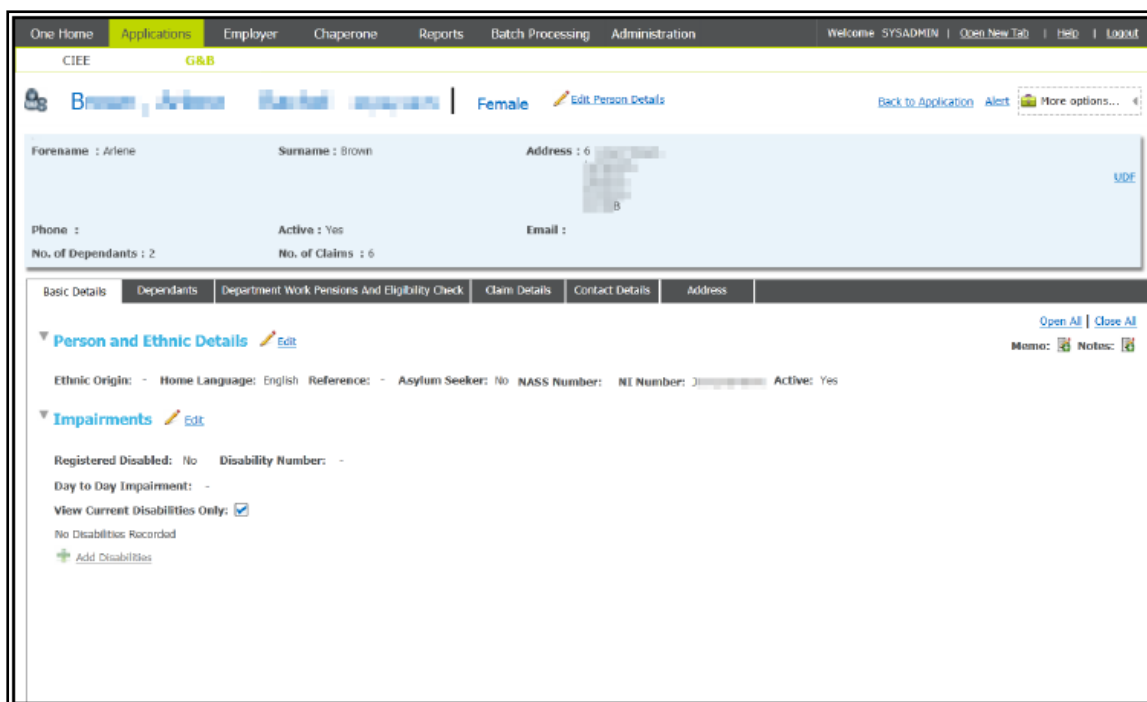
Viewing Dependents

1. Open an application to which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 44.

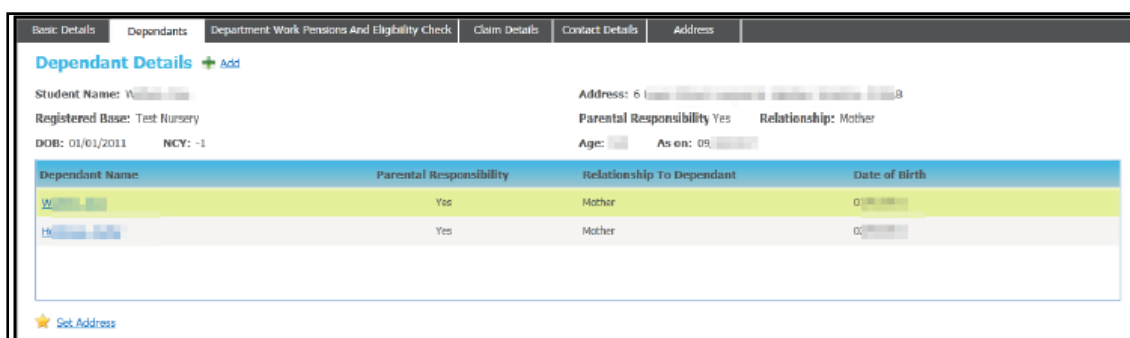
The screenshot shows the 'View Parent/Carer Details' page with the following information:

- View Student Details:**
 - DOB: 03/[redacted]
 - NCY: 0
 - Registered Base: Test Primary
 - Address: 6 [redacted] B
 - Student Contact Number: [redacted]
- View Parent/Carer Details:**
 - NI Number: J [redacted]
 - Address: 6 [redacted] B
 - Parent/Carer Contact Number: [redacted]
 - Asylum Seeker: No
 - NASS Number: [redacted]
- Claim Details:**
 - Claim Item: FSM Primary
 - Area: Southern Area Education Office
 - DWP Office: [redacted]
 - Start Date: 09/10/2017
 - Claim Cost: 1.30
 - Fund: Free School Meals Fund
 - Officer: [redacted]
 - Received Date: 09/10/2017
 - End Date: 29/11/2019
 - Calculated Cost: [redacted]
 - Claim Status: Current
 - Social Services: [redacted]
 - Portal Reference: [redacted]
 - Review Date: 21/07/2001
 - Serial Number: [redacted]
- Authorisation Details:**
 - Status: Pending
 - Authorised Date: 09/10/2017
 - Last Updated On: 09/10/2017
 - Last Updated By: System Administrator

2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.



3. Select the **Dependents** tab to display the list of dependents.



4. To view details about a specific student, click their name in the list to display the **Person Details** dialog.

Verifying Individual FSM Eligibility

G&B enables users to check the eligibility of a parent/carer to make a claim for Free School Meals. This can either be done on an individual basis or as a batch process.

To check the eligibility of an individual, you can click the **ECS Validation** hyperlink when creating an application. This becomes active as soon as the parent/carer is added to the application. Alternatively, the check can be performed after the application is created by opening the application and clicking the **ECS Validation** hyperlink.

More Information:

[Creating a New Grants and Benefits Application \(Student-Centric\)](#) on page 33

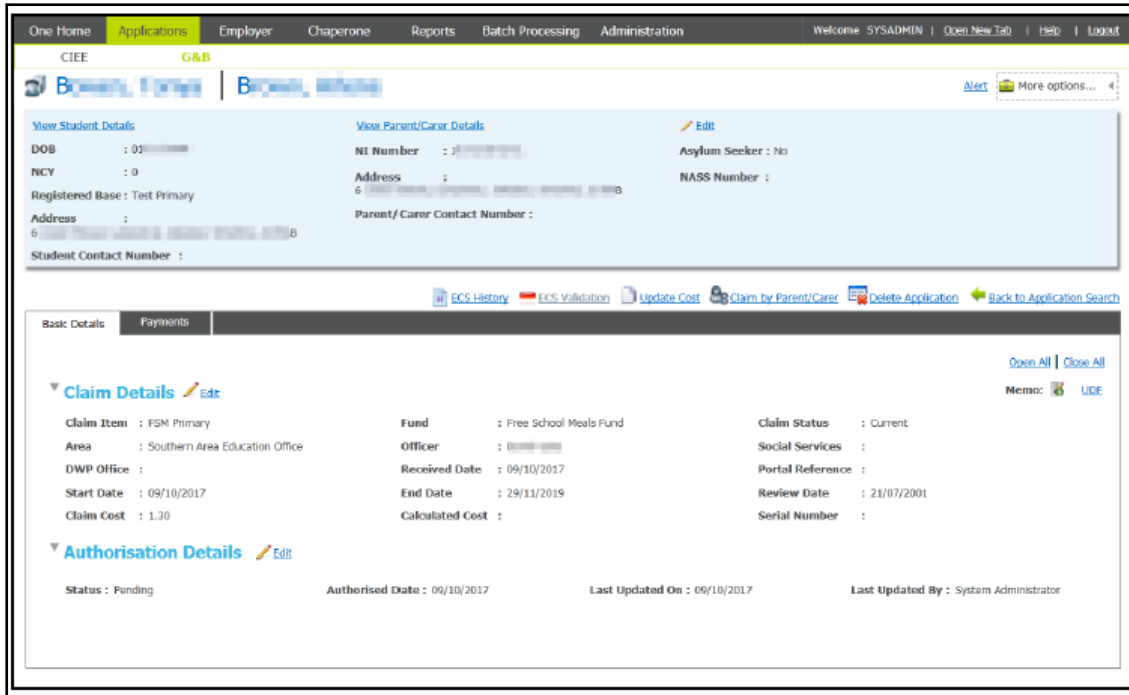
[Creating a New Grants and Benefits Application \(Parent-Centric\)](#) on page 38

[Checking Free School Meal Eligibility](#) on page 62

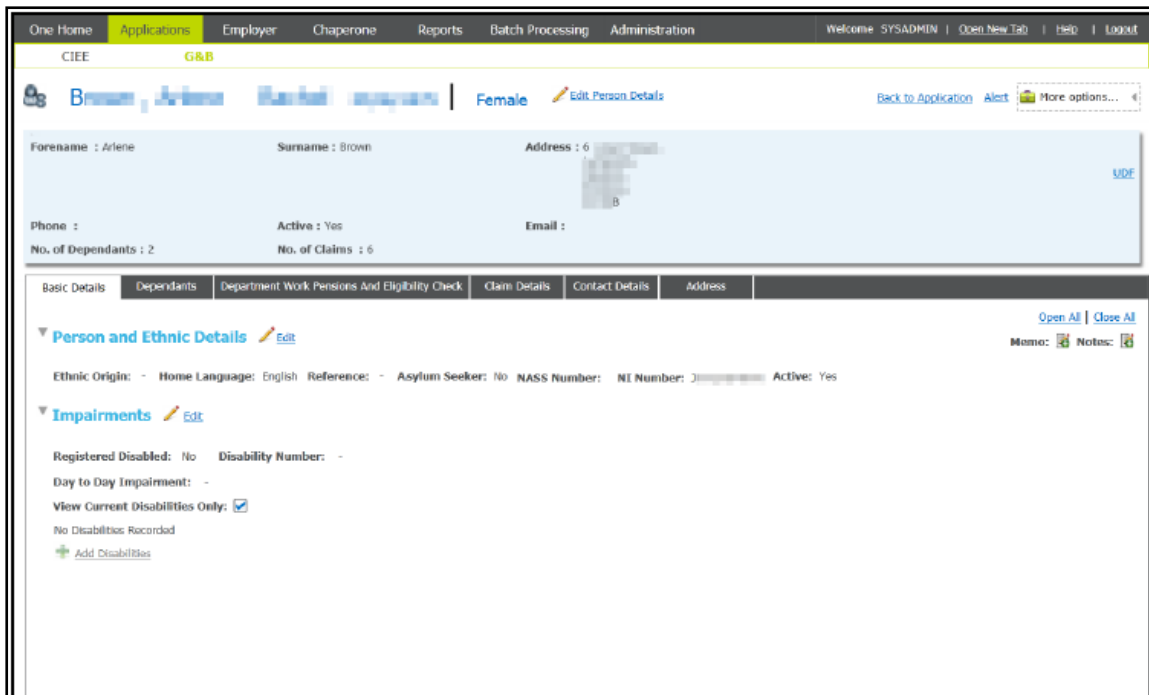
Setting Dependent Addresses

The **Dependents** tab enables you to assign or change addresses for the dependents of a selected parent or carer. You can assign a student's address to a carer, assign a parent's address to an individual student or apply a parent's address to all the dependents.

1. Open an application with which the parent or career is already associated. For more information, see [Opening an Existing Application](#) on page 44.



2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.



3. Select the **Dependents** tab.

Maintaining Parent/Carer Details

Basic Details | Dependants | Department Work Pensions And Eligibility Check | Claim Details | Contact Details | Address

Dependant Details + Add

Student Name: W. [redacted] Address: 6 [redacted] B
Registered Base: Test Nursery Parental Responsibility: Yes Relationship: Mother
DOB: 01/01/2011 NCY: -1 Age: [redacted] As on: 09 [redacted]

Dependant Name	Parental Responsibility	Relationship To Dependant	Date of Birth
W. [redacted]	Yes	Mother	01/01/2011
H. [redacted]	Yes	Mother	01/01/2011

★ Set Address

4. Highlight the student whose address you want to either change or assign to the parent then click the **Set Address** hyperlink to display the **Set Address** dialog.

Set Address

Copy Student Address to this Parent/Carer
 Copy Parent/Carer Address to this Student
 Copy Parent/Carer Address to all Dependants

Current Student Address:
19 [redacted]

Current Parent/Carer Address:
17 [redacted]

Other Dependant's Address:

Surname	ForeName	Address
S [redacted]	[redacted]	[redacted]
S [redacted]	[redacted]	[redacted]

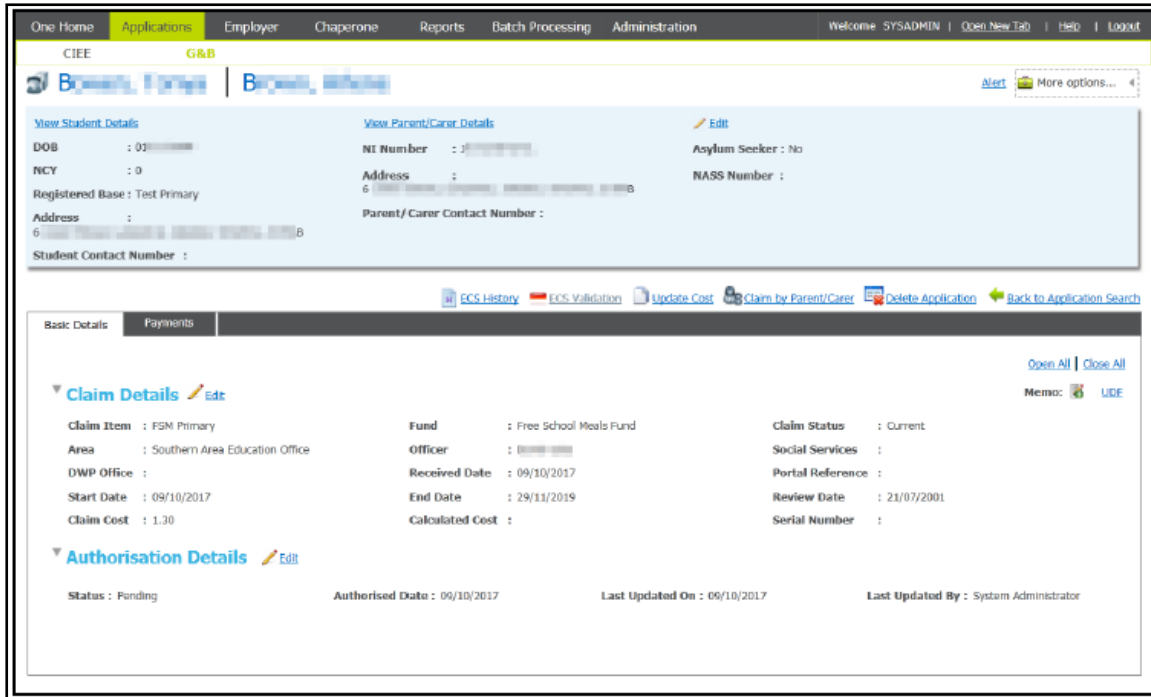
Cancel Select

5. Select the required option then click the **Select** button to record the address changes. After the addresses are updated, the **Set Address** dialog closes automatically.

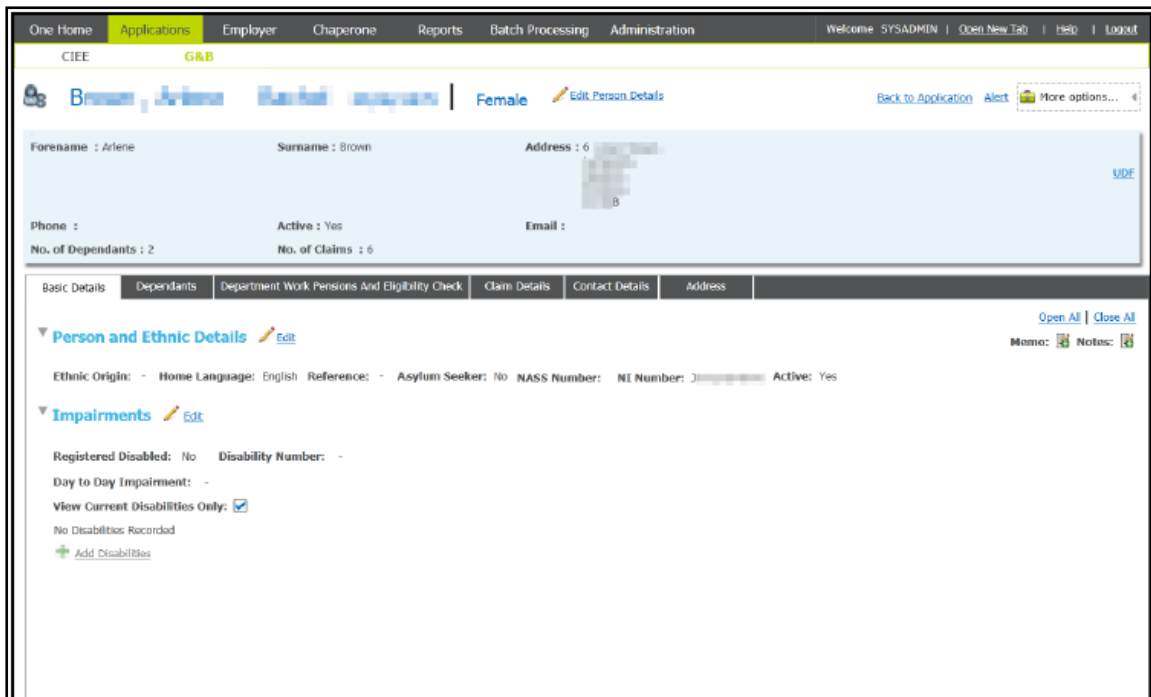
Adding Benefit Claims

All of the benefits claimed by a parent/carers should be recorded in the **Department Work Pensions and Eligibility Check** tab. If G&B has been configured to perform eligibility checks for new applications, One checks the items in this tab to verify whether the parent/carers receives the required benefits before allowing an application to be saved with a **Status** of **Authorised**.

1. Open an application with which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 44.



2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer’s information.

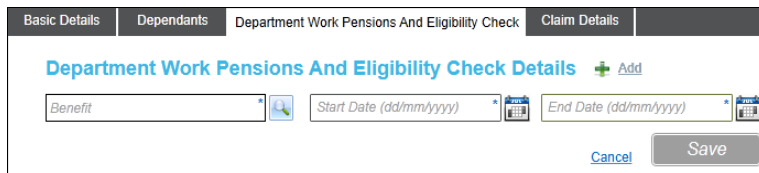


3. Select the **Department Work Pensions and Eligibility Check** tab.

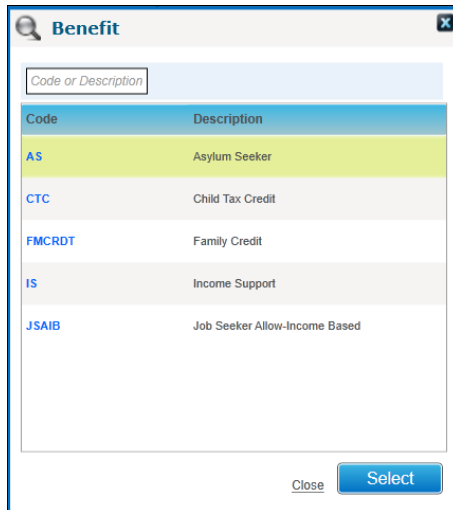


Maintaining Parent/Carer Details

- Click the **Add** hyperlink to display editable fields relating to the claim.

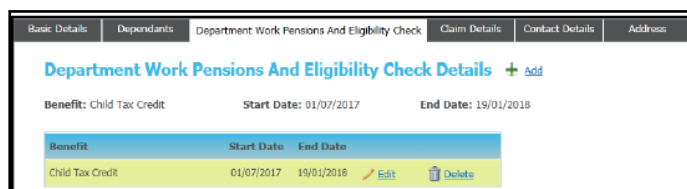


- Click the **Benefit** browse button to display the **Benefit** browser.



Code	Description
AS	Asylum Seeker
CTC	Child Tax Credit
FMCRTD	Family Credit
IS	Income Support
JSAIB	Job Seeker Allow-Income Based

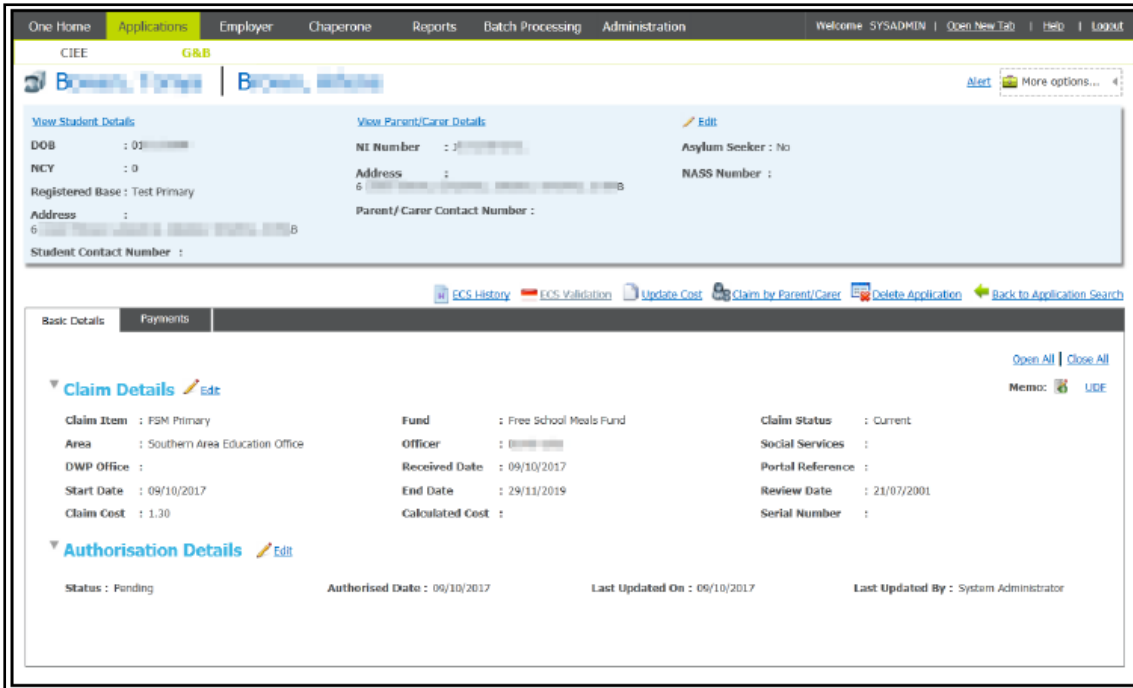
- Highlight the required benefit then click the **Select** button to add it to the record and close the dialog.
- Select the required **Start Date** and **End Date**.
- Click the **Save** button.



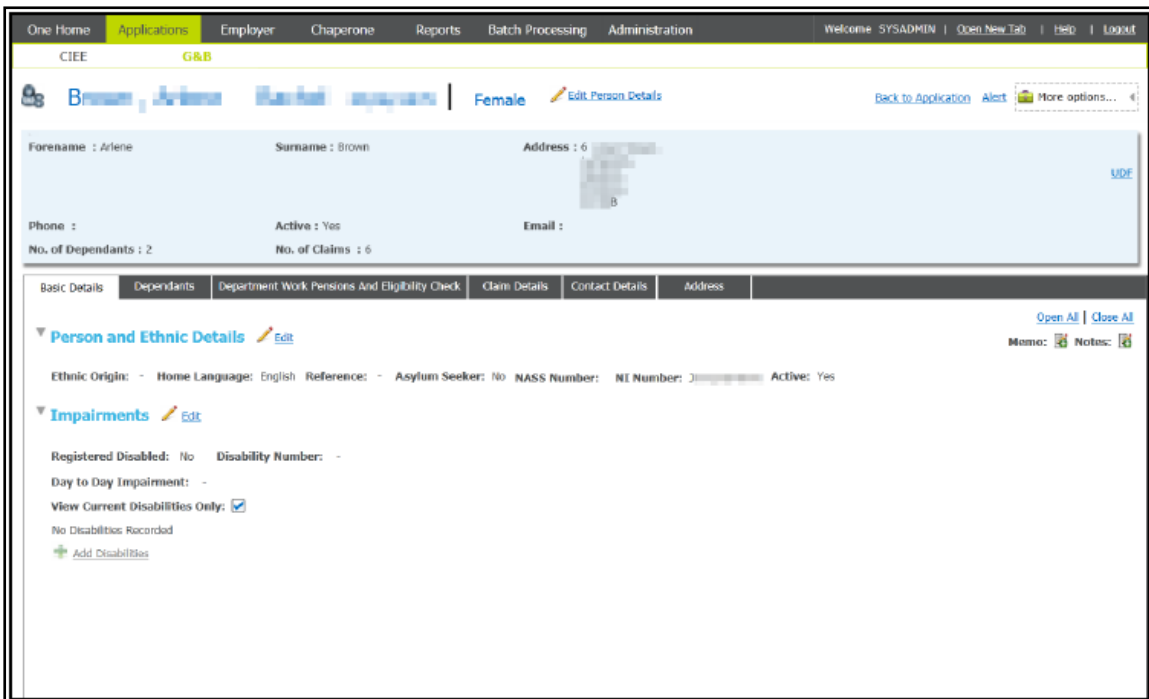
Benefit	Start Date	End Date
Child Tax Credit	01/07/2017	19/01/2018

Viewing Benefit Claims

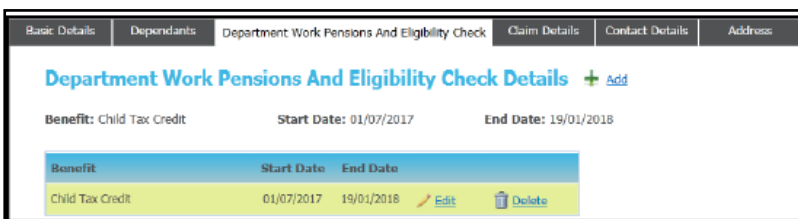
- Open an application with which the parent or career is already associated. For more information, see [Opening an Existing Application](#) on page 44.



2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer’s information.

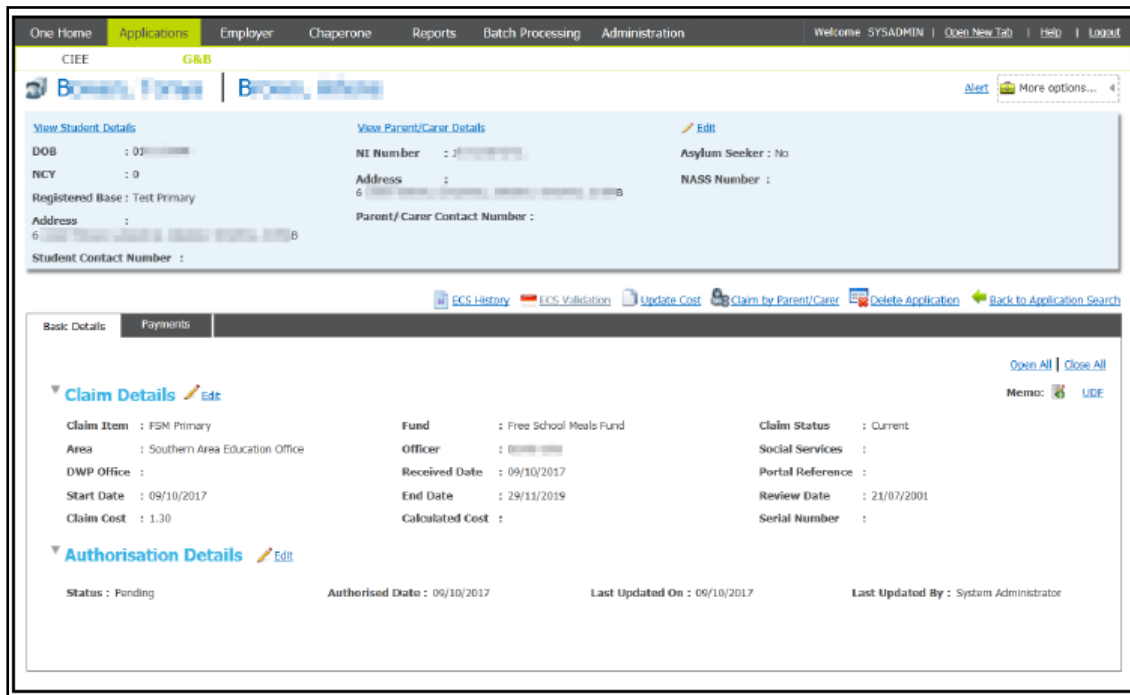


3. Select the **Department Work Pensions and Eligibility Check** tab to display the list of benefits that have been recorded for the parent/carer.

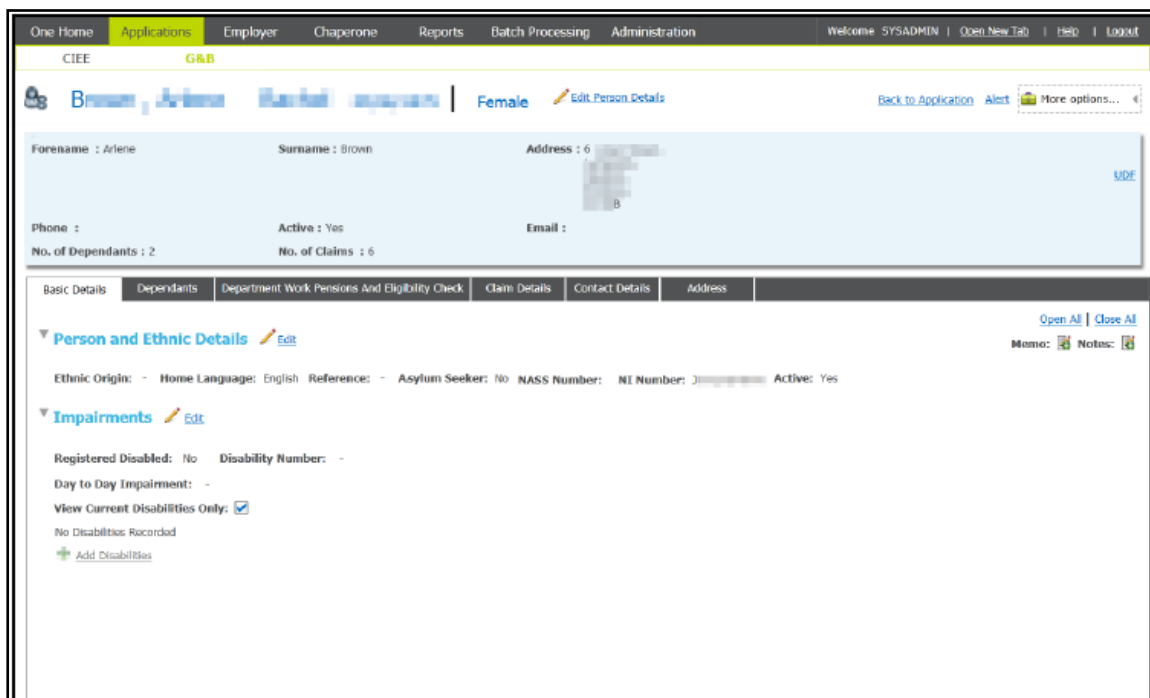


Editing a Benefit Claim

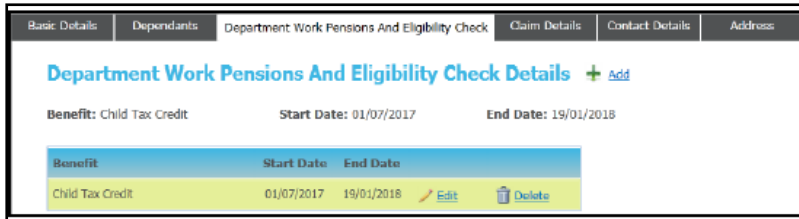
1. Open an application with which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 44.



2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.



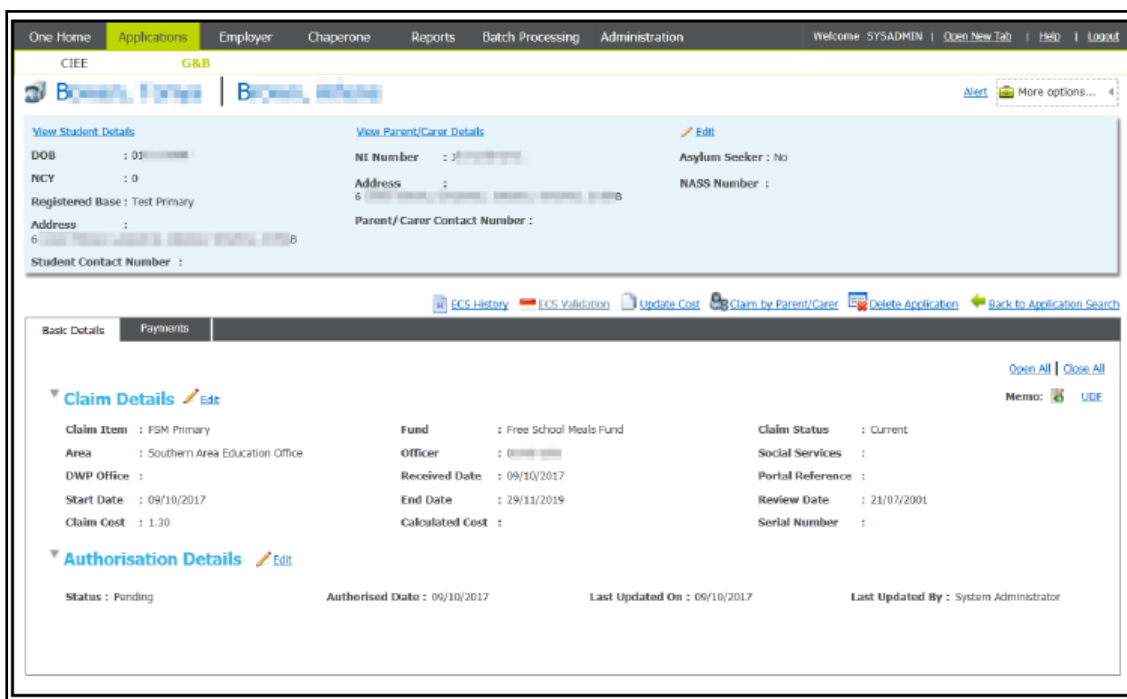
3. Select the **Department Work Pensions and Eligibility Check** tab to display the list of benefits that have been recorded for the parent/carers.



4. For the benefit record you wish to update, click the **Edit** hyperlink to enable editing.
5. Make the required changes.
6. Click the **Save** button.

Deleting a Benefit Claim Record

1. Open an application with which the parent or carer is already associated. For more information, see [Opening an Existing Application](#) on page 44.



2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.

Maintaining Parent/Carer Details

The screenshot shows the 'Person and Ethnic Details' tab selected. The interface includes a navigation bar at the top with options like 'One Home', 'Applications', 'Employer', 'Chaperone', 'Reports', 'Batch Processing', and 'Administration'. Below the navigation bar, there are tabs for 'Basic Details', 'Dependants', 'Department Work Pensions And Eligibility Check', 'Claim Details', 'Contact Details', and 'Address'. The 'Person and Ethnic Details' section is expanded, showing fields for 'Ethnic Origin', 'Home Language', 'Reference', 'Asylum Seeker', 'NASS Number', 'NI Number', and 'Active'. There is also a section for 'Impairments' with fields for 'Registered Disabled' and 'Disability Number'. A 'View Current Disabilities Only' checkbox is checked, and a table shows 'No Disabilities Recorded' with an 'Add Disabilities' button.

3. Select the **Department Work Pensions And Eligibility Check** tab to display the list of benefits that have been recorded for the parent/carers.

The screenshot shows the 'Department Work Pensions And Eligibility Check Details' tab. It displays a list of benefits with columns for 'Benefit', 'Start Date', and 'End Date'. A single record is shown: 'Child Tax Credit' with a start date of '01/07/2017' and an end date of '19/01/2018'. There are 'Edit' and 'Delete' buttons next to the record.

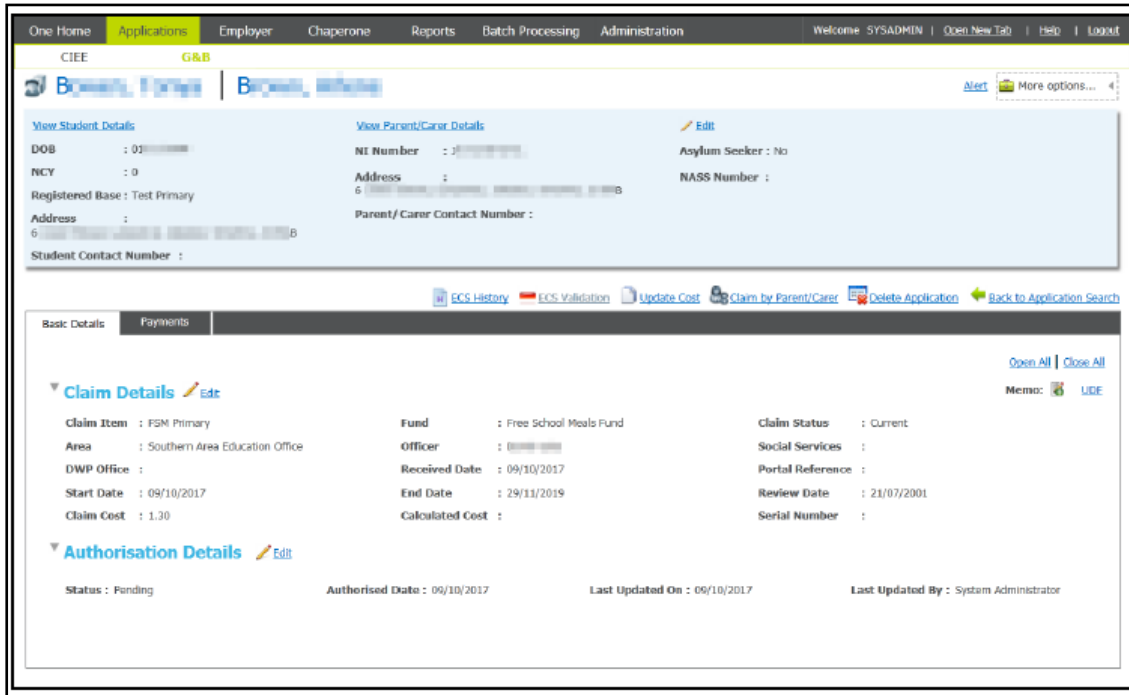
Benefit	Start Date	End Date
Child Tax Credit	01/07/2017	19/01/2018

4. For the benefit record you wish to delete, click the **Delete** button to display the **Delete Department Work Pension Details** dialog.
5. Click the **Yes** button to complete the deletion.

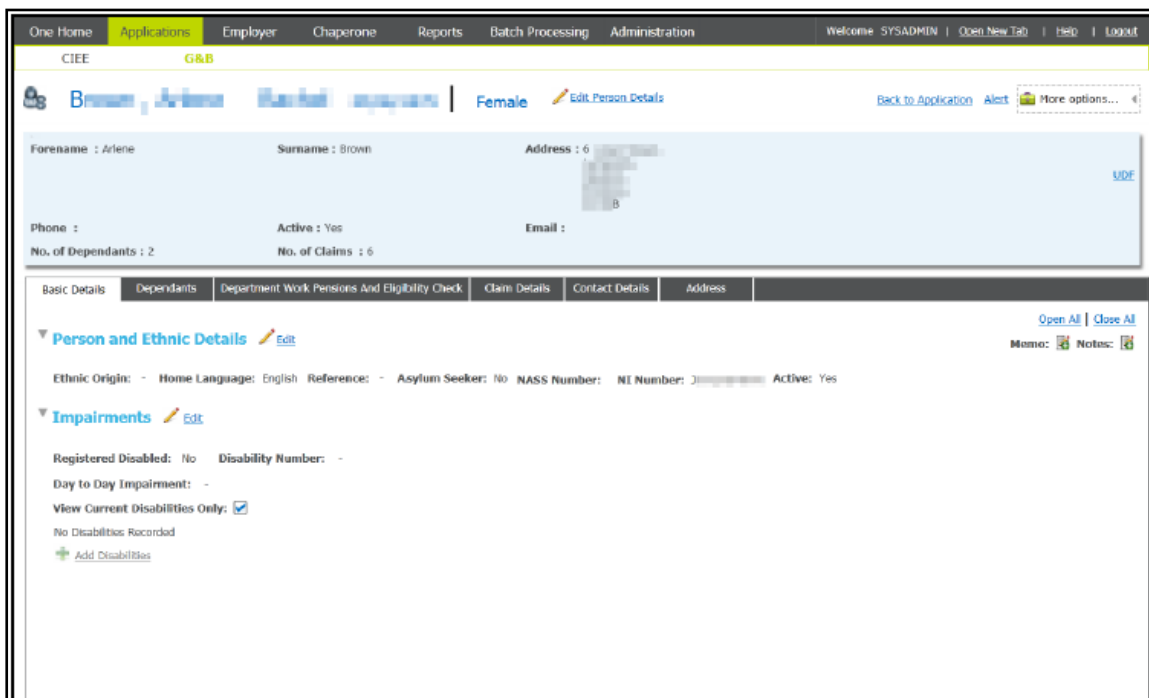
Viewing Grants and Benefits Claim Details

All the claims with which a parent/carer is associated are displayed in the **Claims Details** tab. From here, you can view the details of a student or view specific claim applications.

1. Open an application with which the parent or career is already associated. For more information, see [Opening an Existing Application](#) on page 44.



2. Click the **View Parent/Carer Details** hyperlink to display the parent or carer's information.



3. Select the **Claim Details** tab to display the list of claims made by the parent.

Maintaining Parent/Carer Details

Basic Details	Dependants	Department Work Pensions And Eligibility Check	Claim Details	Contact Details	Address					
Claim Details										
<input type="checkbox"/>	Student Name	Claim Item	Start Date	End Date	Review Date	Cost	Authorisation Status	Claim Status	Memo	Application
<input type="checkbox"/>	He [REDACTED]	Shop One	11/10/2013	01/09/2014	22/02/2014		Authorised	Current		View Application
<input type="checkbox"/>	W [REDACTED]	Shop One	24/11/2013	22/10/2014	02/04/2014		Authorised	Current		View Application
<input type="checkbox"/>	He [REDACTED]	FSM Primary	09/10/2017	29/11/2019	21/07/2001	1.3	Pending	Current		View Application
<input type="checkbox"/>	W [REDACTED]	FSM Primary	09/10/2017	29/11/2019	21/07/2001	1.3	Pending	Current		View Application
<input type="checkbox"/>	Bc [REDACTED]	FSM Primary	09/10/2017	29/11/2019	21/07/2001	1.3	Pending	Current		View Application
<input type="checkbox"/>	Bc [REDACTED]	Shop One	24/09/2013	29/05/2014	09/04/2014		Authorised	Current		View Application
Batch Process + Add New Application										

4. To view details of a student, click their name to display the **Person Details** dialog.
5. To view an application, click the required **View Application** hyperlink.

06 | Managing Reports

Overview

There are three preconfigured Crystal reports relating to G&B. The available reports are:

- ECS BatchValidation FailedList
- ECS BatchValidation ProcessedList
- G&B Claims

Managing reports in G&B is similar to managing reports in other areas of One v4 Online. For more information on using the reports functionality, refer to one of the following reference guides:

- RG_Online_Common_Reports
- RG_Online_Reports
- RG_Online_Reports (ATBO)

ECS BatchValidation FailedList

This report lists all the records that failed validation in the ECS Batch Validation.

The data displayed in the report is from the One database and the fields **Surname, Date of Birth, NI Number** or **NASS**.

If the report is run while the DWP is still processing a batch ECS submission, the invalid records will display the error text on the **Status** column. Records with the **NotProcessed** status are valid records but are not yet processed.

If the report is run after the saving the returned results from the ECS, all the records with the **NotProcessed** status are removed and only the records that failed validation are displayed.

ECS BATCH VALIDATION - INVALID RECORDS (FAILED)						
Claim ID	Person ID	Surname	Date of Birth	NI Number	NASS	Status
65	608	P				NeitherNinoNorNas
77	649	R				NeitherNinoNorNas
64	603	P				NeitherNinoNorNas
165	2677	A		Z		NationalInsurance
106	781	W				NeitherNinoNorNas
209	4694	C	01-1985	P		NotProcessed
188	4836	G	12-1973	P		NotProcessed
10	434	B				NeitherNinoNorNas
14	457	P				NeitherNinoNorNas
716	8973653	b	28-1991	Y		NationalInsurance
747	8953534	J	04-1995	P		NotProcessed
1069	8953545	A	28-1996	T		NationalInsurance
825	8953727	C	21-1995			NeitherNinoNorNas
834	8953598	A	12-1995			NeitherNinoNorNas
1052	8953534	J	04-1995	P		NotProcessed
715	8973653	b	28-1991	Y		NationalInsurance
742	8953549	A	24-1994			NeitherNinoNorNas
1014	8974024	g	01-2013			SurnameInvalid
826	8953542	A	19-1994			SurnameInvalid

ECS BatchValidation ProcessedList

This report lists all the records that were successfully processed and have returned an eligibility status or either **NotFound** (i.e. not eligible) or **FoundAndEligible** (i.e. eligible):

ECS BATCH VALIDATION - VALID RECORDS (PROCESSED)						
Claim ID	Person ID	Surname	Date of Birth	NI Number	NASS	Status
145	2679	B	01-1985	P		FoundAndEligible
193	3600	A	10-1923	P		NotFound
204	588	C	01-1985	P		FoundAndEligible
137	2669	A	01-1985	P		NotFound
168	2679	B	01-1985	P		NotFound
156	618	P	01-1985	P		NotFound
700	10006343	R	01-1985	P		NotFound
243	8889381	B	09-1999	P		FoundAndEligible

G&B Claims

The G&B Claims report provides a list of anyone who has made a G&B related application to the LA.

Claim details by Guardian						
Student	Item	Start date	Status	Authorisation	End date	Review date
	TestItemCategory	01/02/2013	Current	Authorised	28/02/2013	25/09/2013
Claim details by Guardian						
Student	Item	Start date	Status	Authorisation	End date	Review date
	Clothing	10/09/2013	Current	Pending	10/09/2013	10/09/2013
	books	28/03/2013	Current	Authorised	30/03/2013	25/09/2013
Claim details by Guardian						
Student	Item	Start date	Status	Authorisation	End date	Review date
	FSM Primary school	10/10/2013	Current	Authorised	01/11/2013	30/10/2013
Claim details by Guardian						
Student	Item	Start date	Status	Authorisation	End date	Review date
	BC Fund 001	03/09/2013	Current	Authorised	30/09/2013	25/09/2013
Claim details by Guardian						
Student	Item	Start date	Status	Authorisation	End date	Review date
	suman	22/03/2013	Current	Authorised	23/03/2013	25/09/2013

07 | Appendix

One v4 Online Common Functionality

The One v4 Online version of G&B shares functionality with other One modules. For help using functionality shared with other modules, use the following resources.

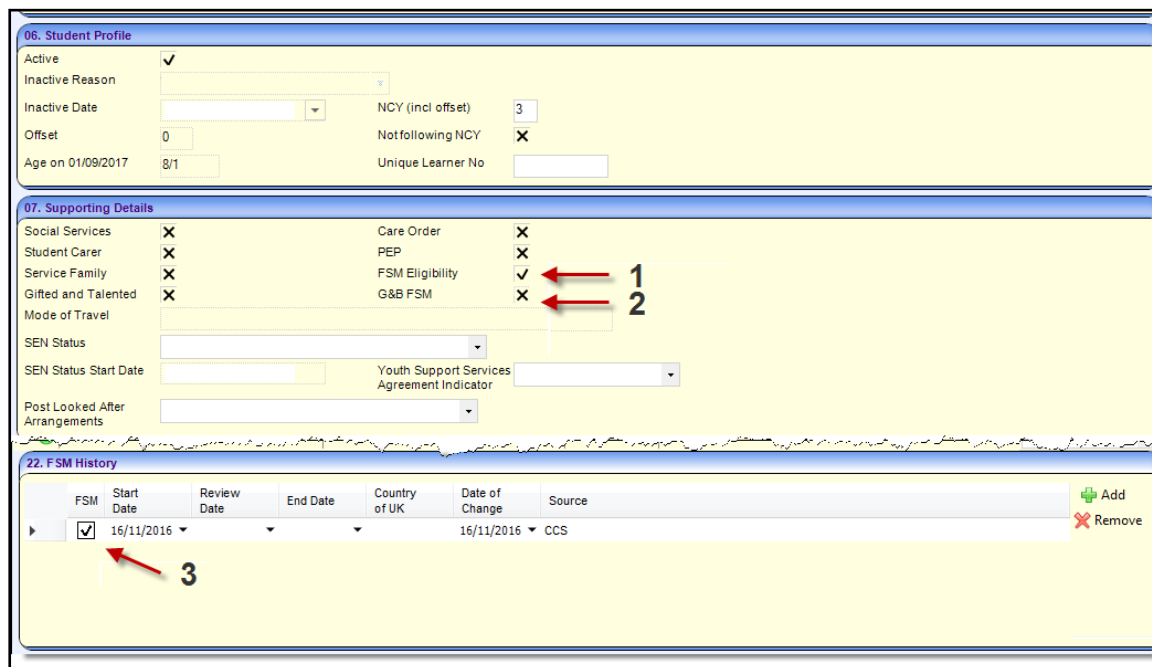
- Alerts – *Managing Alerts* topic in the v4 Online help.
- Linked Reports – *Managing Linked Reports* topic in the v4 Online help.
- Linked Documents – *Linked Documents* topic in the v4 Online help.
- Communications Log - *Maintaining the Communications Log* topic in the v4 Online help.
- SQL Query Mail Merge – *Maintaining SQL Mail Merge* topic in the v4 Online help.

FSM Data and the FSM History Scheduled Task

Overview

The Grants and Benefits module stores Free School Meals (FSM) data in the One database. This and the data is updated automatically by the FSM History scheduled task. The following sections provide more details as to where the information is stored and how and when it is updated.

The following graphic highlights the G&B FSM related fields in the **Student Details** page of the v4 Client (accessed via **Focus | People | Students | Student Enquiry**) and briefly describes how they are set.



Number	Description
1	Calculated automatically when the student record is opened, based on the data within the FSM History panel. You can also toggle the value directly. If you do so, then a new line is added in the FSM History panel. This flag is not stored in the database.

Number	Description
2	<p>If there is an FSM claim in G&B that is both authorised and current, then the <code>FSMEAL</code> field in the database is set to true and a tick is displayed here.</p> <p>If there is no valid and authorised FSM claim in G&B, then the FSM History panel is checked instead. If the current row of the FSM History panel has a tick, the <code>FSMeal</code> field in the database is set to true and a tick is displayed here.</p> <p>If neither of the above applies, then the <code>FSMeal</code> field in the database is set to false and a cross is displayed here.</p>
3	<p>Any changes you make here will affect the FSM Eligibility value in the Supporting Details panel next time you open the Student record and will affect the G&B FSM value the next time the FSM scheduled task runs.</p>

Where is FSM data stored in the One database?

EDUCATION_DETAILS.FSMEAL

The `FSMEAL` field in the `EDUCATION_DETAILS` table is included in the `STUDENT` view. It enables easy reporting on various attributes of a student. It is a flag which can be true (T), false (F) or null (empty).

This field is only updated by the FSM History scheduled task. It is an aggregation of the data held in both the `CLAIMS` table and the `CPD_FSM_HIST` table.

The `FSMEAL` field value is displayed in the **G&B FSM** check box on the **Supporting Details** panel of the **Student Details** page in the v4 Client. If the `FSMEAL` value is T, it is displayed as a tick. If it is F or null, then it is displayed as a cross.

One also maintains the `FSM_END` field in the `EDUCATION_DETAILS` table, which represents the currently expected end date of this FSM eligibility period, if known. This field is also updated by the FSM History scheduled task.

CPD_FSM_HIST.CPD_FSM

The `CPD_FSM` field contains the true (T) or false (F) flag for a given row from **FSM History** panel of the **Student Details** page in the v4 Client. For a specified child, the **FSM Eligibility** flag is set by the `CPD_FSM` field in the FSM History row of the `CPD_FSM_HIST` table that covers the current date.

For English LAs, FSM History records include a start and end date. The end date can be blank until a record with a later start date is added for the student or an end date is determined.

For non-English LA's, FSM History records include a date of change only.

This field/table can be updated manually via the **Student Details** page and by importing data from B2B or other sources.

The `CPD_FSM` field value, T or F, is displayed in two places in the v4 Client Student page; the **FSM History Panel** check box and the **FSM Eligibility** check box of the **Supporting Details** panel. If the `CPD_FSM` value is T, it is displayed as a tick. If it is F or null, it is displayed as a cross.

CLAIMS

The `CLAIMS` table contains applications made via the G&B module. Not all of these applications will be for FSM claims, an alternative example could be a school uniform grant application.

FSM History Scheduled Task

For all customers, the FSM History scheduled task updates the `FSMEAL` field on the `STUDENT` view in the One database.

For customers with a G&B v3 or G&B v4 licence, `FSMEAL` is visible in the v4 Client as the **G&B FSM** value displayed on the **Student Summary** panel of the **Student Details** page.

For customers without a G&B v3 or G&B v4 licence, the G&B FSM value/label is not displayed (as the value will match the FSM Eligibility flag after the scheduled task has been run).

The FSM History scheduled task updates slightly different information depending on whether you have a G&B licence.

The scheduled task can be set up in the v4 Client via **Tools | Administration | Scheduled Task**. FSM History can be added to a scheduled task via the **Actions** panel. This task should run once a day outside of office hours and generally after B2B:Student imports (if FSM data is set to import for your LA).

The task updates the G&B FSM flag based on the following business rules:

1. Checks if the student is active (based on the `ACTIVE` field in the `STUDENT` view).

If the student is not active, then their record will not be updated. If it is active then the task continues.

2. Checks for an FSM claim in G&B which is both authorised and current. If a particular claim meets these criteria, the `FSMEAL` field (G&B FSM flag) is set to True (a tick) and the `FSM_END` field is set to the claim end date.

If the G&B FSM flag was set to a tick on the previous line, the task stops here for that student. If the flag was not set to a tick, the task continues.

3. Checks for an FSM History record that covers the current date and has a tick/true flag against it. If a FSM History record meets these criteria, then the `FSMEAL` field (G&B FSM flag) is set to true (tick) and the `FSM_END` field is set to:

- **English LAs** - the FSM History row **End Date**
- **Non-English LAs** - NULL (empty).

If the G&B FSM flag was set to a tick on the previous line, the task stops here for that student. If the flag was not set to a tick, the task continues.

4. As none of the above conditions (other than the student being active) have been met, then the `FSMEAL` field (G&B FSM flag) is set to False (a cross) and the `FSM_END` field is set to NULL (empty).

NOTE: The difference between English and Non-English LA's in Step 3 occurs because English LAs record specific start and end dates for FSM records, while Non-English LAs only record a date of change (and so the end date is not generally known until a later date).