



# Early Years - Two Year Old Funding Citizen Portal

last updated for the Autumn 2020 (3.73) release

Handbook

**CAPITA**

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# 01 | Document Change Control

Date	Release	Description
Autumn 2020	3.73	<p>When searching for addresses, only those marked as <b>Active</b> will be displayed in the list. If the postcode of an Inactive address is entered, a message stating 'No Results' is displayed.</p> <p>If an address used in the portal is made <b>Inactive</b>, the address will still be displayed in the area that it has been used, eg <b>My Account   Contact Details</b>, applications, etc.</p> <p><b>V4 online   Administration   System Administration   Address Management   Manage Addresses</b></p> <p>New functionality has been added to manage addresses. This includes making them active/inactive.</p>
Summer 2020	3.72	<p><b>Administration   Configure Portal Settings</b></p> <p><b>Ineligible Application Settings</b> is a new panel that allows a Local Authority to choose if the details on an ineligible application is submitted to Portal Back Office for matching or not.</p> <p><b>For more information see</b> Error! Bookmark not defined.</p>
Spring 2020	3.71	<p><b>Site Logo and Header text</b></p> <p>Portal administrators can now configure the site logo and header text so that they do not get overwritten during upgrades.</p> <p><b>Administration   General Administration   Edit Resources</b></p> <p>When editing resource descriptions, the Resource Culture now shows EN or CY depending on which tab is selected.</p> <p>In order to comply with Welsh regulations, Welsh LAs must provide versions of all pages of their websites in both English and Welsh.</p> <p>For example:  <a href="https://www.local-authority.gov.uk/en/CitizenPortal">https://www.local-authority.gov.uk/en/CitizenPortal</a>  <a href="https://www.local-authority.gov.uk/cy/CitizenPortal">https://www.local-authority.gov.uk/cy/CitizenPortal</a></p> <p>When starting a new registration on Citizen portal, or there is an update to the GDPR, there is an option to change the language selection on the GDPR pop-up to display either English or Welsh so that it can be read in the user's preferred language.</p> <p>In Citizen Portal the contrast between foreground and background colors have been checked to ensure they meet WCAG 2 AA contrast ratio thresholds across all pages.</p> <p>References to CY-GB will display as CY.</p>

Date	Release	Description
<p><b>August 2019</b></p>	<p><b>3.69.007</b></p>	<p>Changes have been made to the <b>Find Address</b> functionality throughout the <b>One Citizen Portal</b> for this hotfix:</p> <ul style="list-style-type: none"> <li>• When registering for a Citizen Portal account, a link is available to the <a href="#">Post Office Postcode Finder</a> website to help you with your address.</li> <li>• A <u>full</u> postcode must be used to search for an address.</li> <li>• Only addresses matching the <u>full</u> postcode are displayed in the search results.</li> <li>• If the address you require is not on the LA's database, a <b>Not able to find your address?</b> button is available to add the new address details.</li> <li>• You <u>must</u> use the <b>Search</b> button and <u>not</u> the <b>Enter</b> key to search for an address.</li> <li>• There is no limit to the number of addresses that are displayed in the search results list.</li> </ul>
<p><b>Summer 2019</b></p>	<p><b>3.69</b></p>	<p>The <b>Secret Question</b> and <b>Answer</b> have been removed from the Registration, My Account and Forgotten Password processes to simplify the login process.</p> <p>A <b>Show</b> button now enables citizens to see their password as they type.</p> <p>Validation messages are displayed when the Title, Forename, Surname or Gender are changed on any of the <b>Personal Details</b> pages.</p> <p>The <b>Address Selection</b> process has been improved; users can now select an address from a known list instead of adding it manually.</p> <p>A <b>partial postcode search</b> has been introduced to improve the <b>Find Address</b> process. An address can now be found using the Street name.</p> <p>If an address is changed, a validation message is displayed on any of the <b>Contact Details</b> pages.</p> <p>The 'white-space' has been trimmed on all form submissions, e.g "Ian" and "Ian ". This will prevent conflicts when matching data.</p>

Date	Release	Description
Spring 2019	3.68	<p><b>Carer Date of Birth</b></p> <p>A validation check has been introduced to prevent a Carer from being added that is under 16 e.g. too young to have a National Insurance Number.</p> <p>See <a href="#">Making an Economic Application</a> on page 64.</p>
		<p><b>Update to Data Protection Consent Statement</b></p> <p>If an LA updates its Data Protection Consent Statement, an additional dialog is displayed when logging on to the Citizen Portal.</p> <p>For more information, see <a href="#">GDPR Update</a> on page 50.</p>

# 02 | Citizen Self Service Admin

## Overview

The One Citizen Self Service portal is a secure online gateway provided by the Local Authority enabling users to apply for the following services:

- 30 Hour Entitlement
- Courses
- Free School Meals
- Two Year Old Funding
- School Places
- Special Educational Needs and Disabilities
- Transport.

These applications are then transferred into One for loading into the appropriate modules:

Citizen Self Service Portal	One
30 Hour Entitlement	Early Years v4
Courses	Training Manager v4
Free School Meals	Grants and Benefits v4
Funded Early Education for 2 year olds	Early Years v4
School Places	Admissions and Transfers v4
Special Educational Needs and Disabilities	SEND v4
Transport	Transport v4

For local authorities, it enables staff to easily match information supplied via the portal to data already held in the Capita One database. Local authority staff can interactively match records and resolve conflicts with people data, removing the need to import and process data manually.

The Citizen Portal Admin functionality is available to Local Authorities in One v4 Online, subject to a licence and v4 Client permissions. The Citizen Portal Admin enables local authority teams to view filtered lists of the portal applications and the details of each application.

**NOTE:** Throughout the Citizen Self Service portal, clicking in a field displays a tooltip containing information on the selected field. Tooltips are managed via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title**.

**More Information:**

*Deploying and Configuring the One Citizen Self Service Portal for Local Authorities* technical guide, available from the [One Publications](#) website.



## Using this Handbook

This handbook is intended for One Administrators at the Local Authority. It describes the following administration processes performed by the authority:

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

At the end of this handbook, there is a section explaining how the parent, carer or guardian makes an application. For more information, see [Introduction to Making Applications](#) on page 45.

# 03 | Managing Users

## Citizen Self Service Portal Administrator

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

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

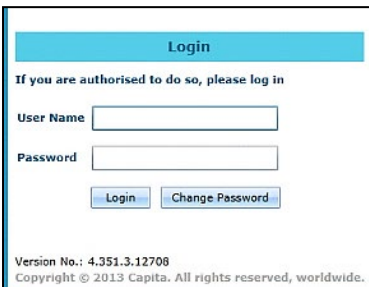
### More Information:

*Deploying and Configuring the One Citizen Self Service Portal for Local Authorities* technical guide, available from the [One Publications](#) website.

## Logging in to One v4 Online

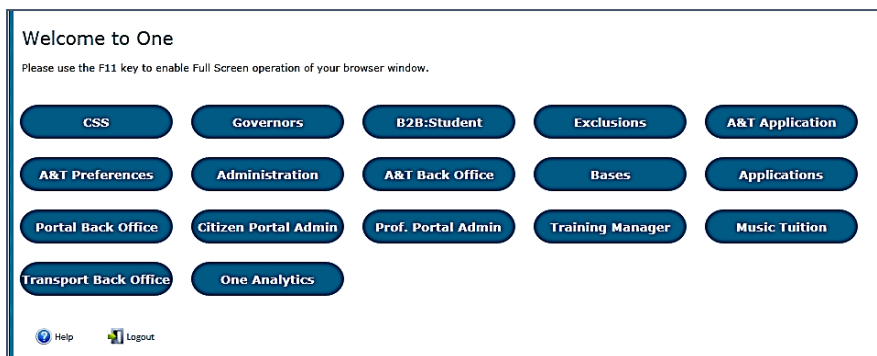
To log in to One v4 Online, you need to obtain a licence key for the required v4 Online module from Capita. You must also be set up as a user in One v4 Client.

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



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

## Managing Users



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

### More Information:

*RG\_Online\_Administration\_Login\_Logout* available from the [One Publications](#) website.

## Changing a Password

To change your password in v4 Online:

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

2. On the **Change Password** dialog, enter your **Old Password**.
3. Enter your **New Password**.
4. Enter your new password again in the **Confirm New Password** field.
5. Click the **OK** button.

### More Information:

*RG\_Online\_Administration\_Login\_Logout* available from the [One Publications](#) website.

## Forgotten Password

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

Check that you have entered the correct email address.

If you have forgotten your password, it will need to be reset.

Site logo

Home

There were problems logging you in

- Email Address/Password is incorrect. Please try again.

Don't have an account? Please [register](#)

**Email Address**

Portal06@onetestsmp.co.uk

**Password**

Login

Forgotten your password?

To reset a password:

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

Home

Forgotten Password

You need to choose a new password to keep your account protected. First we need some information to help us identify your account.

**Email Address**

Continue

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

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

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

Dear [redacted]

You have chosen to reset your password, to enable you to login to the [redacted]

In order to complete this process, you must login again using the new password you have chosen.

If you can see a link below, you may click on this to open our service, otherwise please copy and paste the text into your Internet browser.

<https://one-.../ResetPassword?/>

Kind regards,

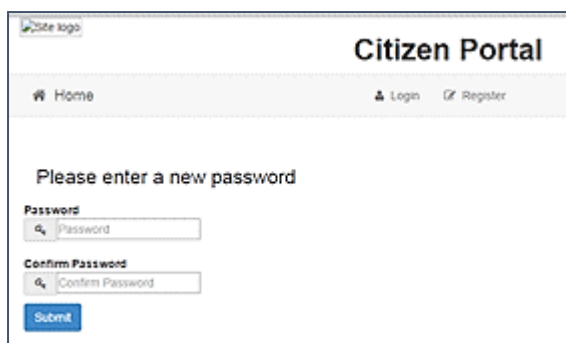
[redacted] Administrator

IMPORTANT - PLEASE DO NOT REPLY TO THIS EMAIL AS IT MAY NOT GO TO YOUR LOCAL AUTHORITY. TO CONTACT US, PLEASE SEE THE DETAILS BELOW:

Contact Us

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

## Managing Users



The screenshot shows the 'Citizen Portal' interface. At the top, there is a 'Home' link and 'Login' and 'Register' buttons. The main heading is 'Please enter a new password'. Below this, there are two input fields: 'Password' and 'Confirm Password', each with a magnifying glass icon. A blue 'Submit' button is located at the bottom left of the form.

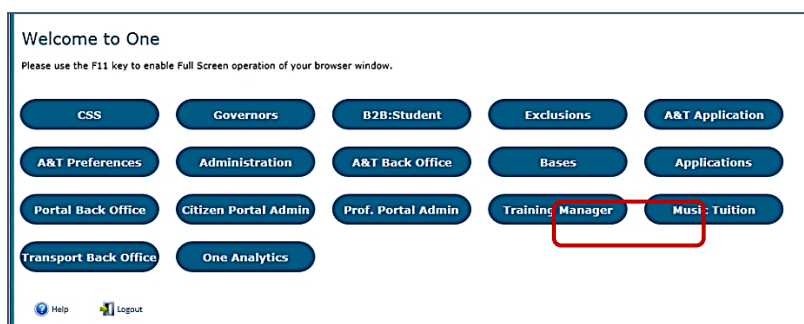
4. Enter your new **Password**. Passwords are case sensitive.
5. Enter your new password again in the **Confirm Password** field.
6. Click the **Submit** button. A message confirms that you have successfully changed your password.
7. Click the **Login** button to log in to the Citizen Portal with your new password.

## Logging in to Citizen Portal Admin

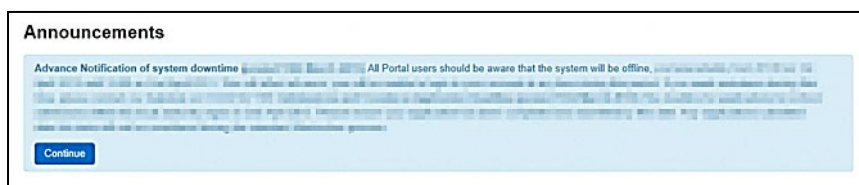
The **Citizen Portal Admin** functionality is available in One v4 Online. To use the Citizen Portal Admin you must have an email address, be set up as a user and belong to a user group in One v4. Your System Administrator will have set up the Citizen One Portal licence key and your permissions via **v4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

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

1. Log in to v4 Online. For more information see [Logging in to One v4 Online](#) on page 7.



2. Click the **Citizen Portal Admin** button to display the **Announcements** page.



The **Announcements** page displays only if there are announcements regarding the portal.

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

The **Announcements** page is edited via **Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks**.

Announcements

Placeholder\_Title

The Announcements page is edited via **Administration | General Administration | Edit Resources | Resource Configuration Title | Markdown | Text Blocks.**

Announcement Start Date	Placeholder_Forename
Announcements End Date	Placeholder_Surname

**NOTE:** If there are no announcements, clicking the **Citizen Portal Admin** button displays the **Home** page.

**More Information:**

*Deploying and Configuring the One Citizen Self Service Portal for Local Authorities* technical guide, available from the [One Publications](#) website.

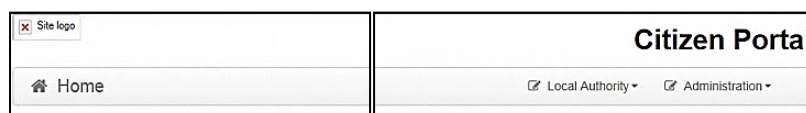
## The Citizen Portal Home Page

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

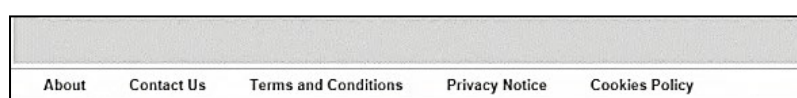
- **Administration** – for more information, see the [Home | Administration Page](#) section on page 12.
- **GDPR Administration** – for more information, see the [Home | GDPR Administration Page](#) section on page 12.
- **Local Authority** – for more information, see the [Home | Local Authority Page](#)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

These can be accessed by clicking on the buttons or selecting an option on the navigation bar.

The Citizen Portal header displays the site logo. This is installed by the System Administrator when installing the Citizen Self Service portal.



The Citizen Portal footer displays the following links:



- **About** – displays information about the local authority. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices\_About.**
- **Contact Us** – displays contact details such as address, phone numbers and email address. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices\_Contact.**
- **Terms and Conditions** – displays the terms and conditions for using the Citizen Self Service Portal. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices\_TAndC.**
- **Privacy Notice** – displays additional information regarding privacy. This text is formatted in One v4 Online via **Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices\_PrivacyNotice.**
- **Cookies Policy** – displays information regarding the cookies that are placed on the user's computer when logging in to the portal. This text is formatted in One v4 Online via **Citizen**

**Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices\_CookiesPolicy.**

## Home | Administration Page

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

The **Home Administration** page enables the following administration processes to be performed by the local authority:

- Free School Meals Administration
- Home to School Transport Administration
- School Places Administration
- General Administration.

## Home | GDPR Administration Page

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

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

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

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

## Home | Local Authority Page

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

From here the administrator can manage applications and users.

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

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

Clicking the **User Management** button displays the **User Management** page. For more information, see [User Management \(Local Authority\)](#) on page 13.

## User Management (Local Authority)

The User Management page enables the administrator to view user details and to change their email address and password.

The screenshot shows the 'User Management' page for 'Local Authority'. It features a search bar with the text 'Enter part of First Name, Surname Or Email Address' and a search input field containing 'sh'. Below the search bar, it indicates '247 Records found' and provides pagination controls. A table displays a list of users with columns for Email Address, First Name, Surname, Confirmed status, View Details, and Action (Change Email Address | Reset Password).

**NOTE:** If there are any errors reported when changing an email address or password, the record must be changed in One v3.

### Viewing User Details

To view a user's details:

1. Select **v4 Online | Citizen Portal Admin | Home | Local Authority | User Management** to display the **User Management Search** dialog.
2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of local users that have registered for the One Citizen Self Service portal.
3. Click the **View Details** link to display the **View Users Details** dialog. Details are displayed for Claimant, Children and Applications. You cannot make any changes.
4. Click the **Back** button to return to the **User Management** page.

### Changing a User's email Address

To change a user's email address:

1. Select **v4 Online | Citizen Portal Admin | Home | Local Authority | User Management** to display the **User Management Search** dialog.
2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of users that have registered for the One Citizen Self Service portal.
3. Click the **Change Email Address** link to display the **Confirm Email Update** dialog. You are asked to confirm that you are resetting the email address for the correct account.
4. Enter the **New Email Address**.
5. Confirm the **New Email Address**.
6. Click the **Continue** button to return to the **User Management** page.



## Resetting a User's Password

To reset a user's password:

1. Select **v4 Online | Citizen Portal Admin | Home | Local Authority | User Management** to display the **User Management Search** dialog.
2. Enter part of a first name, surname or email address, then click the **Search** button to display the list of users that have registered for the One Citizen Self Service portal.
3. Click the **Reset Password** button to display the **Confirm Password Reset** dialog. You are asked to confirm that you are resetting the password for the correct account.
4. Click the **Continue** button to return to the **User Management** page.

# 04 | General Administration

## Introduction to General Administration

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



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

- **Portal Configuration** – configure the general application settings used by the portal. For more information, see the following sections:
  - [Portal Configuration](#) on page 16.
  - [Configuring the Site Settings](#) on page 16.
  - [Configuring Password Settings](#) on page 17.
  - [Configuring ECS Settings](#) on page 17.
  - [Configuring Application Settings](#) on page 19.
  - [Configuring Message Settings](#) on page 21.
  - [Configuring Application Type Settings](#) on page 23.
  - [Configuring Scheduled Task Settings](#) on page 23.
- **Template Management** – create, change or remove templates used within the messages. For more information, see the following sections:
  - [Template Management](#) on page 24.
  - [Creating a Template](#) on page 25.
  - [Viewing Templates](#) on page 27.
  - [Editing a Template](#) on page 27.
  - [Deleting a Template](#) on page 28.
- **Configurable Question Library** – set up and manage a library of questions to be used in the One A&T module.

## General Administration

- **Edit Resources** – edit site texts and contents. For more information, see the following sections:
  - [Edit Resources](#) on page 29.
  - [Editing Resource Descriptions](#) on page 30.
- **Cache** – see which data is cached and clear the cache. For more information, see the following section:

[Cache](#) on page 33.

## Portal Configuration

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

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

### More Information:

[Configuring the Site Settings](#) on page 1.

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

## Configuring the Site Settings

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

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

## Configuring Password Settings

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

To configure the password security settings:

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

The screenshot shows the 'Password Settings' panel with the following fields and values:

Field Name	Value
Minimum password length	8
Maximum password length	15
Minimum digits in password	2
Minimum number of lower case characters	1
Minimum number of upper case characters	1
Forgotten password check period	15
Forgotten password attempts	3
Locked account forgotten password check period	180

3. Click the **Save** button.

## Configuring ECS Settings

The **ECS (Eligible Checking Service) Settings** panel is used to store the credentials and information used for connection to the Department for Work and Pensions (DWP) online checking service.

To configure the ECS settings:

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

The screenshot shows two side-by-side panels. The left panel, titled 'ECS Settings', contains several dropdown menus: 'ECS Mock Eligibility Status' (set to 'Eligible'), 'ECS Mock Error Status' (set to 'Success'), and 'ECS Environment' (set to 'Mock'). Below these are two text input fields for 'ECS Local Authority' and 'ECS Username'. The right panel, titled 'ECS Password', features a blue 'Update ECS Password' button and an 'ECS System Status' section with a blue 'Test' button. Below this is an orange 'ECS Override Settings' section with a note: 'These 'override' settings will normally be empty. They should only be set after guidance from Capita.' At the bottom of the right panel are two empty text input fields for 'ECS Service URI Override' and 'ECS Service Version Override'.

3. To change your ECS Password, click the **Update ECS Password** button to display the **Update ECS Password** dialogue.
4. Enter the new password.
5. Confirm the new password.
6. To view the ECS System Status, click the **Test** button. An information message is displayed from the webpage.
7. Enter the following URL into the **ECS Service URI Override** field:  
<https://ecs.education.gov.uk/fsm.laweb/service/20170701/OnlineQueryService.svc>
8. Enter information into **ECS Service Version Override** only if you have received guidance from Capita One.
9. Click the **Save** button
10. Reset the Portal application to re-load the changes (either IIS Reset, or re-cycle the Application Pool running the Portal application).

### Ineligible Application Settings

The functionality of **Ineligible Application Settings** panel allows a Local Authority to choose if they want the details of a child/carers to be submitted to **Portal Back Office** for matching or not, when an application is ineligible.

The screenshot shows a panel titled 'Ineligible Application Settings'. Below the title is the text 'Submit child and carer details for ineligible TYOF applications?' followed by a blue toggle switch currently set to 'ON'.

A tooltip is displayed when accessing the switch as follow:

*'If set to OFF, only details for eligible TYOF applications will be submitted to Portal Back Office for matching.'*

- If the switch is set to **ON**, then the details of the Child /Carer is submitted to Portal Back Office if the application is ineligible.
- In v4 client the child's student detail record displays an **X** in the **Eligible for 2 year old funding** field.

- If the switch is set to **OFF**, then the details of the Child/Carer will not be submitted to Portal Back Office.

## Configuring Application Settings

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

To configure the application settings:

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

**Application Settings**

Configure Application Settings

**Admissions Online URL**

**Free School Meals application prefix**

**Free School Meals dummy base id**

**Transport application prefix**

**Transport dummy base id**

**Permitted Titles**

**Permitted Relationships**

**School Place application Permitted Faiths**

**Two Year Old Funding Application Prefix**

**Two Year Old Funding Placement Prefix**

**2 Year Old Funding Dummy Base Id**

**2 Year Old Funding application reference UDF field name**

**2 Year Old Funding application second applicant UDF field name**

**The current school base group**

**Training Manager Schools base group**

**SEND Dummy Base Id (Shared with Professional Portal)**

**SEND Form Submission Notification Email Addresses**

3. Click the **Save** button.

## Configuring User Defined Fields (UDFs)

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

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

**More Information:**

*RG\_Administration\_UDFs* available on the [One Publications](#) website.

## Configuring UDFs for Two Year Old Funding

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

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

**More Information:**

*Creating Two Year Old Funding UDFs* section of the *Setting Up Two Year Old Funding for Local Authorities* technical guide available on the [One Publications](#) website.

## Configuring Message Settings

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

To configure the message settings:

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



## General Administration

**Message Settings**

Configure Message Settings

**From address for outbound messages**

**Pre-configured email address**

**2 Year Old Funding Voucher Message Template**

**2 Year Old Funding Ineligible Message Template**

**2 Year Old Funding Move into area Voucher Template.**

**2 Year Old Funding late moving voucher template**

**SEND Parent/Carer Accept Message Template**

**SEND Parent/Carer Reject Message Template**

**SEND Parent/Carer Request Info Message Template**

**SEND Young Person Accept Message Template**

**SEND Young Person Reject Message Template**

**SEND Young Person Request Info Message Template**

**The Portal url**

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

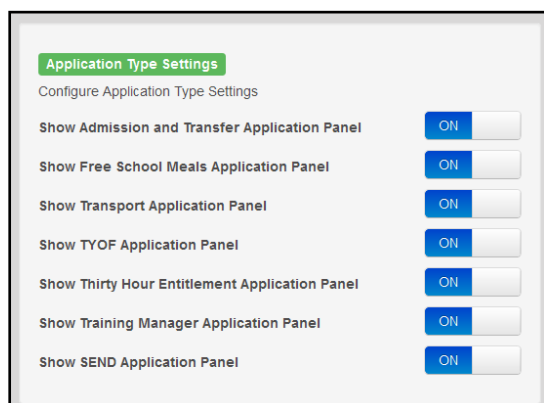
3. Click the **Save** button.

## Configuring Application Type Settings

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

To configure the application type settings:

1. Select One **v4 Online | Citizen Portal Admin | Administration | General Administration | Portal Configuration | Site Settings**.
2. On the **Application Type Settings** panel toggle the panels **ON** or **OFF** as required. Click in a field to display the relevant tooltip.



Label	Toggle
Show Admission and Transfer Application Panel	ON
Show Free School Meals Application Panel	ON
Show Transport Application Panel	ON
Show TYOF Application Panel	ON
Show Thirty Hour Entitlement Application Panel	ON
Show Training Manager Application Panel	ON
Show SEND Application Panel	ON

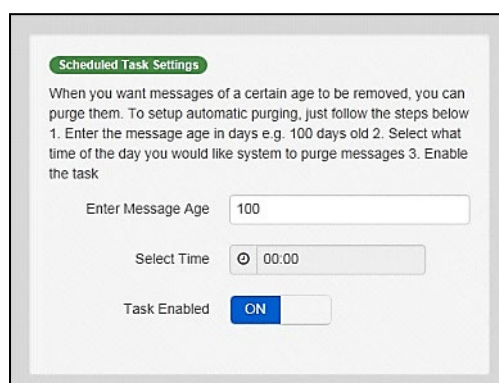
3. Click the **Save** button.

## Configuring Scheduled Task Settings

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

To configure the scheduled task settings:

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



When you want messages of a certain age to be removed, you can purge them. To setup automatic purging, just follow the steps below

1. Enter the message age in days e.g. 100 days old
2. Select what time of the day you would like system to purge messages
3. Enable the task

Enter Message Age:

Select Time:

Task Enabled:

3. Click the **Save** button.

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

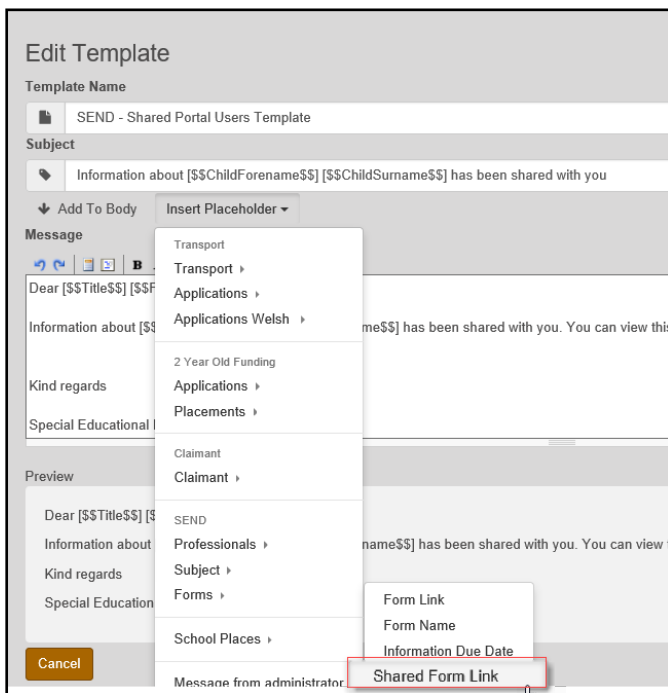
## Template Management

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

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

- Title
- Forename
- Surname
- Business Phone
- Mobile Phone
- Home Phone.

A new Placeholder has been created for **Shared Form Link**. This gives Users the ability to share form(s) on the Portal.



The placeholders are edited via **Administration | General Administration | Edit Resources | Resource Configuration Title | Administration**.

Title	Placeholder_Title
Forename	Placeholder_Forename
Surname	Placeholder_Surname

The placeholders are edited via Administration | General Administration | Edit Resources | Resource Configuration Title | Administration.

Business Phone	Placeholder_BusPhone
Mobile Phone	Placeholder_Mobile
Home Phone	Placeholder_HomePhone

## Creating a Template

To create a new template:

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

6. Enter your text into the **Message** box. Alternatively click the **Add To Subject** button to change it to **Add To Body**, then choose one of the **Insert Placeholder** options.
7. Use the buttons at the top of the **Message** field to format your message. Your formatted message is displayed in the **Preview** field.

The buttons apply **Markdown** formatting, a text-to-HTML conversion tool for web writers. For more information, click the **How to Format** button.

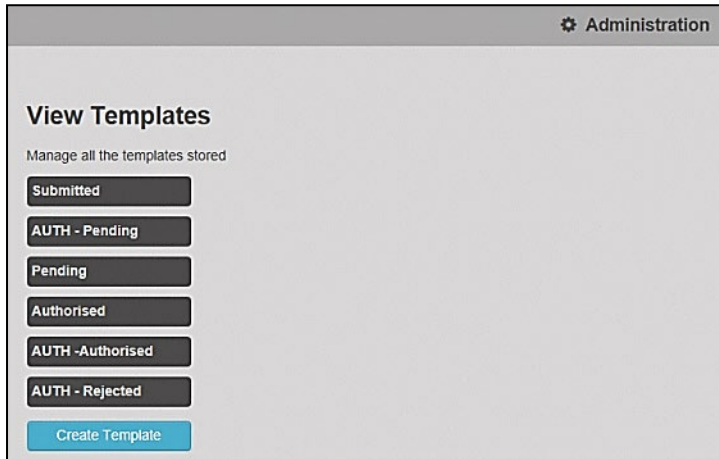
The screenshot shows a web interface for creating a template. At the top right, there is a gear icon and the word "Administration". The main heading is "Create Template". Below this, there are two input fields: "Template Name" and "Subject". To the right of the "Subject" field are two buttons: "Add To Body" and "Insert Placeholder". Below these is a "Message" section with a rich text editor toolbar. The toolbar includes icons for undo, redo, bold, italic, bulleted list, numbered list, link, unlink, and image. To the right of the toolbar is a "How to Format" dropdown menu. The message content area contains the following text: "# Header #", "Dear [\$\$Title\$\$][\$\$Surname\$\$].", and "\*Italic\*". Below the message area is a "Preview" section showing the rendered output: "Header" in a large font, "Dear [\$\$Title\$\$][\$\$Surname\$\$].", and "Italic" in italics. At the bottom of the form are two buttons: "Cancel" (orange) and "Save" (blue).

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

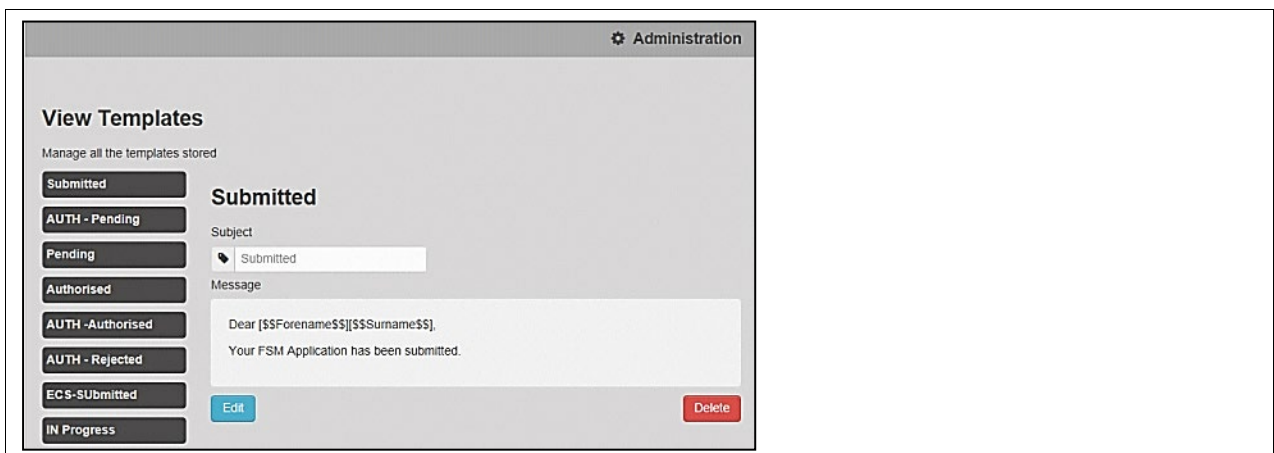
## Viewing Templates

To view an existing template:

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



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



## Editing a Template

To edit an existing template:

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

**Edit Template**

Template Name  
Template 1

Subject  
[\$\${Forename\$\$}[\$\${Surname\$\$}]]

Message  
Dear \$\${Title\$\$}[\$\${Surname\$\$}] Thank you for your application form.  
Kind Regards  
Beds CC

Preview  
Dear \$\${Title\$\$}[\$\${Surname\$\$}] Thank you for your application form.  
Kind Regards Beds CC

Cancel Save

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

## Deleting a Template

To delete an existing template:

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

Administration

**View Templates**

Manage all the templates stored

Submitted

AUTH - Pending

Pending

Authorised

AUTH - Authorised

AUTH - Rejected

Create Template

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

The screenshot shows the 'View Templates' page in the Administration section. On the left, there is a vertical list of template categories: Submitted, AUTH - Pending, Pending, Authorised, AUTH - Authorised, AUTH - Rejected, ECS-SUBMITTED, and IN Progress. The main content area is titled 'Submitted' and shows a preview of a template. The 'Subject' field contains the text 'Submitted'. The 'Message' field contains the text 'Dear [Forename][Surname], Your FSM Application has been submitted.' Below the message field, there are two buttons: a blue 'Edit' button and a red 'Delete' button.

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

## Edit Resources

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

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

### Text Resources

- Account
- Administration
- Admissions
- Citizen Thirty Hours Entitlement
- Consent Resources
- Free School Meals
- Home
- Home Tiles
- Local Authority
- Messaging
- SEND
- Shared
- Training Manager
- Transport
- Two Year Old Funding.

### Markdown

- Text Blocks

To find a particular resource description, open one of the **Resource Configuration Descriptions** then use the **Ctrl + F** keys on your keyboard to display the **Find** dialog. The entered text is highlighted on the page.



## General Administration

Find:	Previous	Next	Options	31 matches
LoginEmailAddress_Tooltip			Please enter the email address you used when registering	Edit
LoginPassword_Tooltip			Enter your password. Please remember this is case sensitive.	Edit

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

## Editing Resource Descriptions

The resource descriptions are individual dialogs that enable you to manage the text that is available to users in many areas of the Citizen Self Service portal. If a **Resource Value** is changed via the **Edit Resource Title** dialog, then the next time a user sees that resource, the text will be updated to reflect the change.

To edit the resource descriptions:

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

The screenshot shows the 'Resource Configuration Title' page. At the top, there is a 'Resource Configuration description' dropdown menu set to 'Account'. Below it is a 'Clear resources cache' button. There are two tabs: 'Default' and 'Welsh (United Kingdom)'. A table below shows the configuration for the 'Account' resource:

Name	Value	
AccountManagement_PageTitle	My Account	Edit

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

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

The screenshot shows the 'Resource Configuration Title' page with the 'Resource Configuration description' dropdown menu set to 'Account'. Below it is a 'Clear resources cache' button. There are two tabs: 'Default' and 'Welsh (United Kingdom)'. A table below shows the configuration for the 'Account' resource:

Name	Value	
AccountManagement_PageTitle	My Account	Edit
AddNonPortalChildren_Title	Please select children for adding to Portal	Edit
Button_NewAddress	Click to add new address	Edit
Button_SaveChild	Save Child	Edit
Button_UsePreviousAddress	Use previous address	Edit
ChangeMyCircumstancesTitle	Change of Circumstances	Edit
Continue_Button_Text	Continue	Edit
Cookie_Policy_Header	Cookie Policy	Edit

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

The following fields are read-only:

- **Resource Type** – the name of the resource configuration title.
- **Resource Key** – the resource database name.
- **Resource Culture** – en (English) or cy (Welsh)

4. Enter your text in the **Resource Value** field.
5. Click the **Save** button to return to the **Resource Configuration Title** page to continue editing the resource descriptions.

### Site Logo and Header text

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

To edit the resource descriptions:

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

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

Name	Value	
CitizenPortal_HeaderText	Citizen Portal	<a href="#">Edit</a>

3. Click the **Save** button to return to the **Resource Configuration Title** page.
4. Select **CitizenPortal\_SiteLogo** and click the **Edit** button to display the **Edit Resource Title** dialog. Enter a description of the logo in the **Resource Value** field, eg: Site Logo.

Name	Value	
CitizenPortal_SiteLogo	Site logo	<a href="#">Edit</a>

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

## General Administration

6. Select **CitizenPortal\_SiteLogo\_URL** and click the **Edit** button to display the **Edit Resource Title** dialog. Enter the URL for the location of the logo, eg: ~/Images/logo\_sml.png.

Name	Value	
CitizenPortal_SiteLogo_Url	~/Images/logo_sml.png	<a href="#">Edit</a>

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

## Configuring Automatic Emails

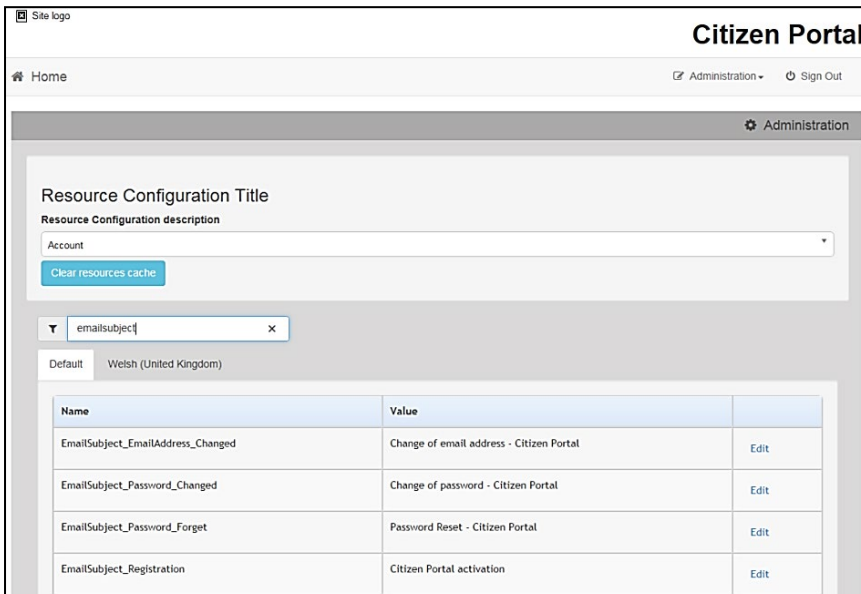
Portal administrators can now configure the text included with automatic emails, sent in response to the following actions in both the One Citizen Portal and the One Professional Portal:

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

**Note:** Different text can be configured for the One Citizen Portal and the One Professional Portal versions of these emails.

This text can be configured by the portal administrator via **Citizen Portal Administration | Administration | Edit Resources | Resource Configuration Title | Text Resources | Account**. Default text has been automatically configured for each.

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

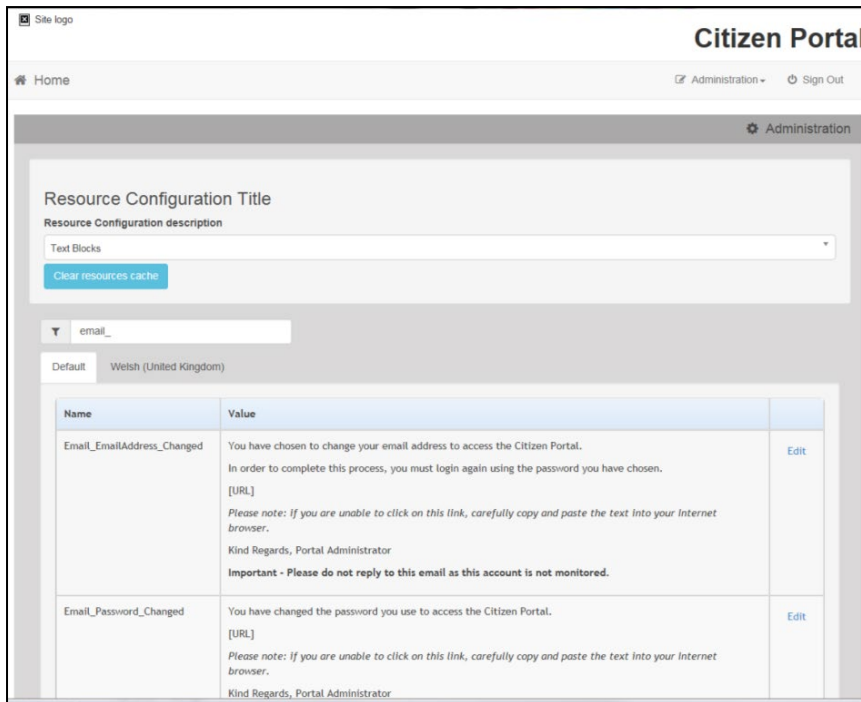


The screenshot shows the 'Citizen Portal Administration' interface. The main content area is titled 'Resource Configuration Title' and shows a dropdown menu for 'Resource Configuration description' set to 'Account'. Below this is a search box containing 'emailsubject'. The search results are displayed in a table with columns for Name, Value, and an Edit button.

Name	Value	
EmailSubject_EmailAddress_Changed	Change of email address - Citizen Portal	<a href="#">Edit</a>
EmailSubject_Password_Changed	Change of password - Citizen Portal	<a href="#">Edit</a>
EmailSubject_Password_Forget	Password Reset - Citizen Portal	<a href="#">Edit</a>
EmailSubject_Registration	Citizen Portal activation	<a href="#">Edit</a>

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

Type *email\_* into the **Search** box to filter the list to display the new configurable content items for the different email types.



The configurable text block resource names are:

- Email\_EmailAddress\_Changed
- Email\_Password\_Changed
- Email\_Password\_Forget
- Email\_Registration

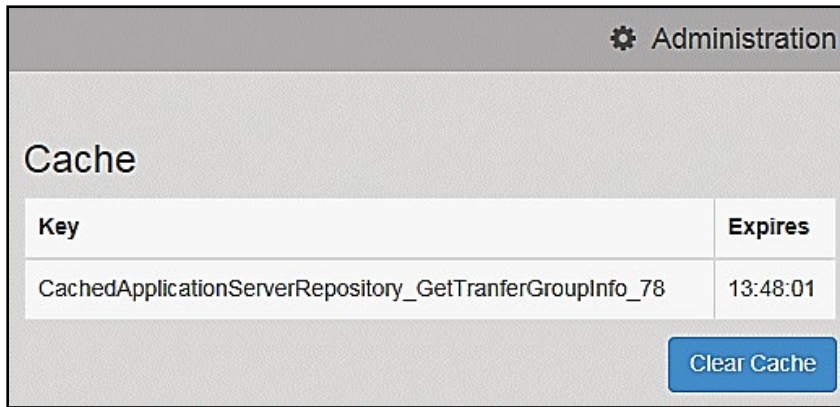
## Cache

The cache is a temporary storage area used to speed up the retrieval of system information. The One system caches information that can take a long time to retrieve or require a large amount of memory. Sometimes issues can occur if the cached data is not updated when new data is entered into One. For example, a new transfer group has been added in One, but is not displaying in the Citizen portal. Clearing the cache forces a data refresh and displays the new data as expected.

The Cache page enables you to see which data is cached; cached data can be cleared from the system.

To clear the cache:

1. Select **Administration | General Administration | Cache** to display the list of cached items.



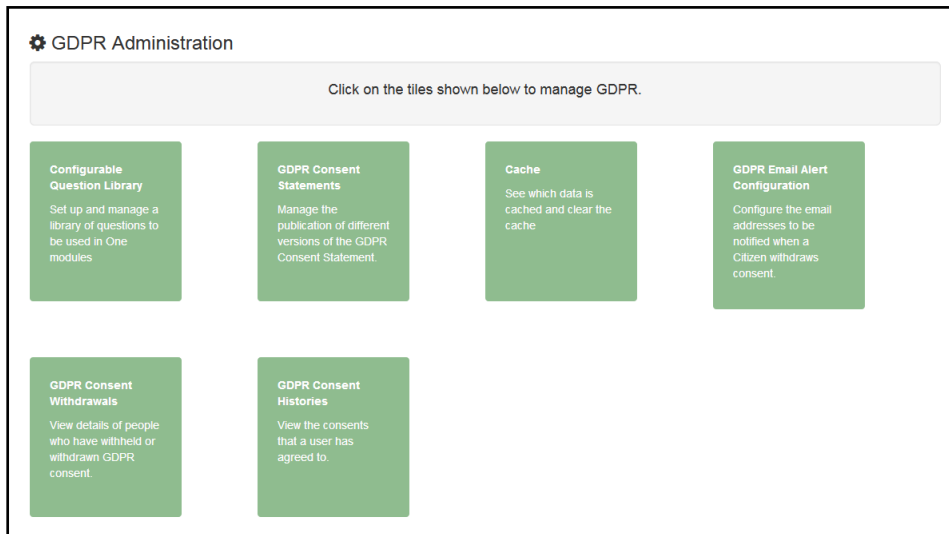
2. Click the **Clear Cache** button to remove the list of cached items. Cached items cannot be deleted individually.
3. Click the **Save** button.

# 05 | GDPR Administration

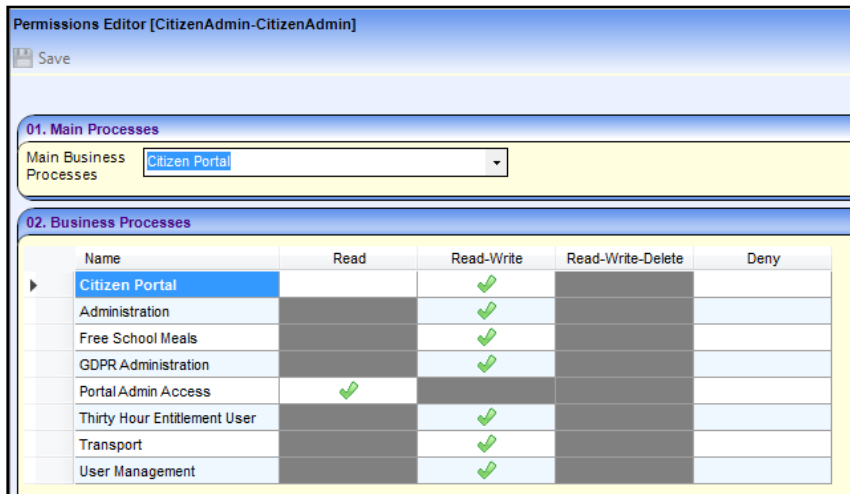
## Introduction to GDPR Administration

### GDPR Administration

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



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

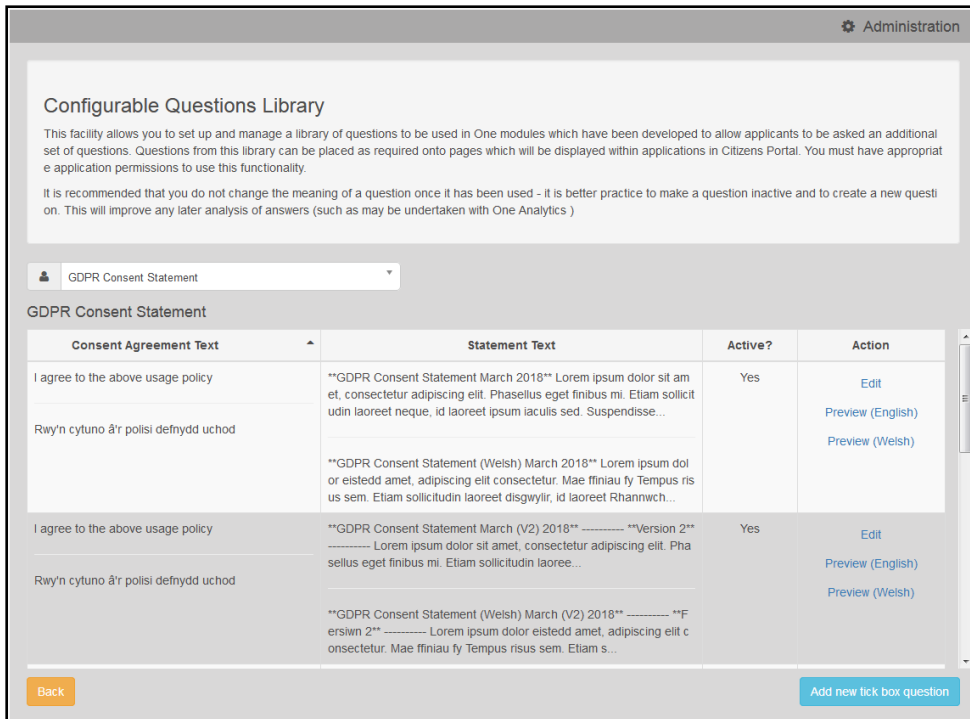


Permissions are set up in the v4 Client via **Tools | Permissions**.

### Setting Up Questions

The **Configurable Questions Library** page enables you to set up the questions to be included in consent statements. Consent statements are used to request agreement from a citizen to hold and process their personal data.

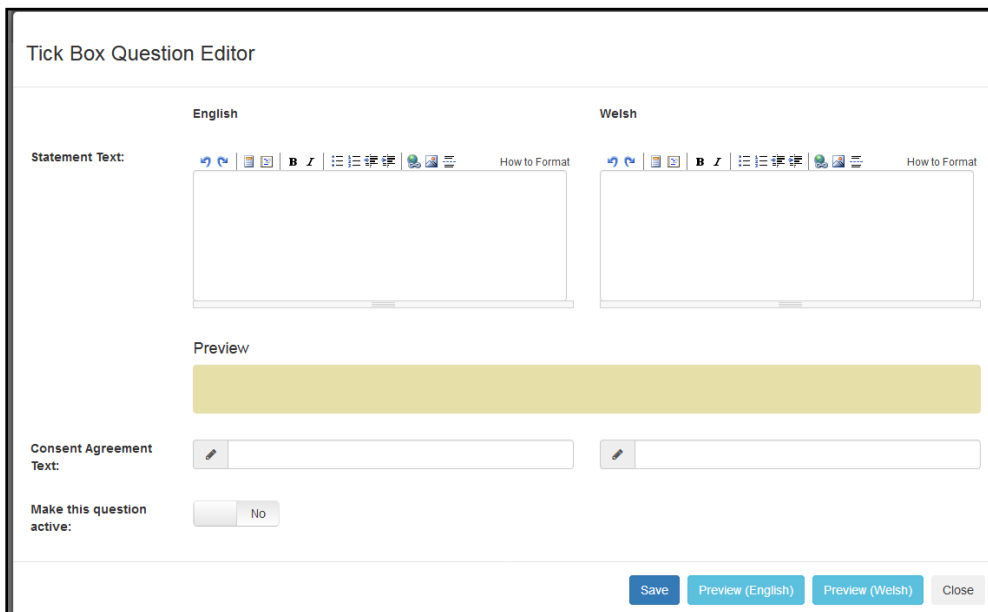
The page is accessed via **GDPR Administration | Configurable Question Library**.



## Adding a New Question

You can add a new question and save it in the Configurable Questions Library. The text can be previewed to see how it will be displayed to a user.

1. Select **GDPR Administration | Configurable Question Library** to display the **Configurable Questions Library** page.
2. Ensure that **GDPR Consent Statement** is selected from the drop-down.
3. Click the **Add new tick box question** button to display the **Tick Box Question Editor** window.



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

5. Enter the **Consent Agreement Text** (in either English or Welsh), This is the question text that is presented to the user with a tick box asking them to agree that their personal data is held in accordance with the contents of the Consent Statement.
6. If required, click the **Make this question active** button.
7. If required, click the **Preview (English)** or **Preview (Welsh)** button.
8. Click the **Save** button.

## Publishing a Consent Statement

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

## Adding a New Consent Statement

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

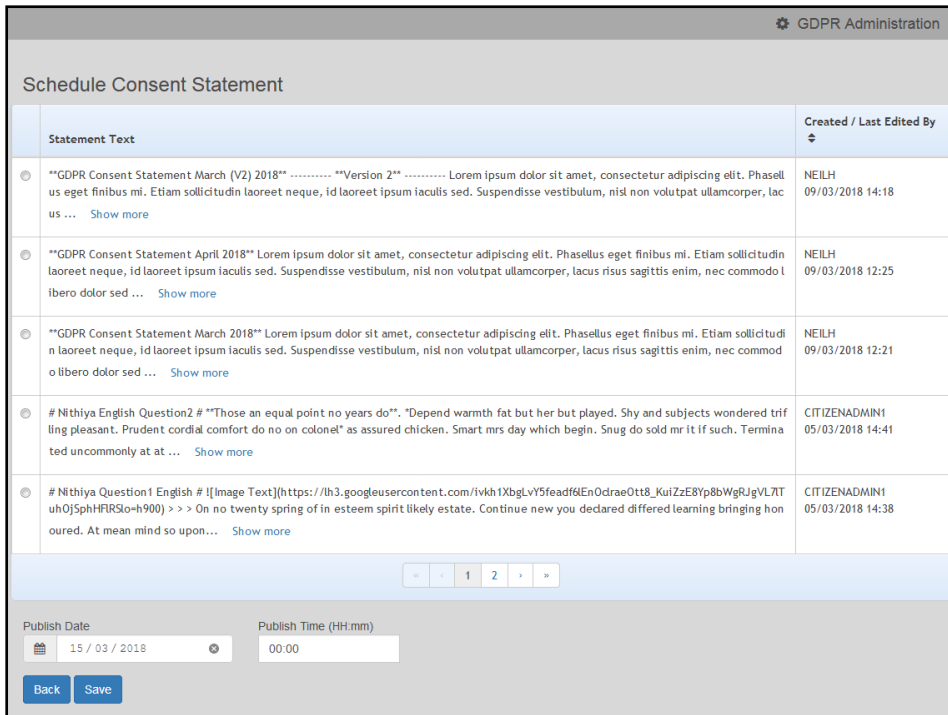
1. Select **GDPR Administration | GDPR Consent Statements** to display the **GDPR Consent Statement Schedule** page.

Statement Text	Scheduled By	Publication Date	Version Number	Action
**GDPR Consent Statement April 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	NEILH 09/03/2018 14:16	01/04/2018 00:01	11	<a href="#">Delete</a>
**GDPR Consent Statement March (V2) 2018** ..... **Version 2** ..... Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	NEILH 09/03/2018 14:19	09/03/2018 14:20	10	
**GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	NEILH 09/03/2018 13:30	09/03/2018 13:35	9	
**GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	NEILH 09/03/2018 12:37	09/03/2018 13:00	8	
**GDPR Consent Statement March 2018** Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum laculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ... <a href="#">Show more</a>	NEILH 09/03/2018 12:36	09/03/2018 12:55	7	

[Add New](#)

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



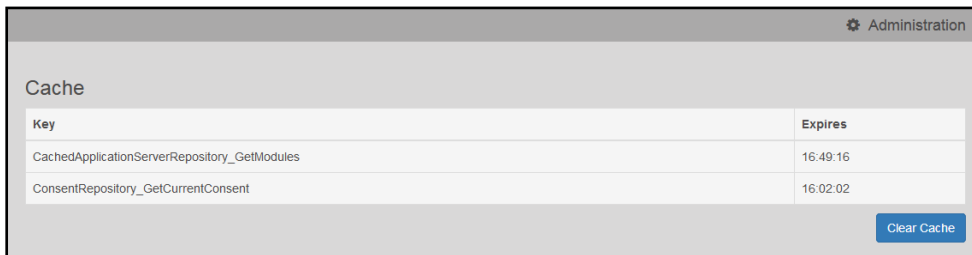


3. Select the radio button adjacent to the required statement and click the **Save** button.

## Clearing Cache

To view cached data and clear it:

1. Select **GDPR Administration | Cache** to display the **Cache** page.



2. If required, click the **Clear Cache** button.

## Configuring Email Alerts

To set up a list of email addresses that will receive a notification when a user withdraws GDPR consent:

1. Select **GDPR Administration | GDPR Email Alert Configuration** to display the **GDPR Email Alert Configuration** page.

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

## Viewing Consent Withdrawals

You can view a list of those who have withheld or withdrawn consent. You can view details of any associated children and mark the record as having been actioned.

1. Select **GDPR Administration | GDPR Consent Withdrawals** to display a list of people who have withheld or withdrawn GDPR consent.
2. If required, enter search criteria and click the **Search** button to display matching records.

Public Userid	Name	One Personid	Date of Birth	EmailAddress & OneLine Address	Children	Consent Withdrawal Date	Action taken on	Action taken by	Action
10068	Neil			portal19@onetestsmtmp.co.uk 12, Greyfriars, BEDFORD, Simshire, MK40 1HJ	No Children	09/03/2018 13:47	09/03/2018 14:00	Clara Penneington	Action already taken
8249	Neil		25/12/1976	portal19@onetestsmtmp.co.uk 12, Greyfriars, BEDFORD, Simshire, MK40 1HJ	1 Child	09/03/2018 13:20			Mark Actioned

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

PortalStudentId	Name	OnePersonId
15308	Ruth Hall	

4. If required, click the **Mark Actioned** button to update the **Action** status.

## Viewing Consent History

To view a history of when a user has agreed or withdrawn consent:

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

GDPR Administration

GDPR Consent History

Please search for a Citizen Portal Account Holder. Once an account is selected a list of their GDPR consents will be shown.

Enter name, email or id of user.

2. Enter search criteria and click the **Search** button to display a history of consents for each person.

GDPR Administration

GDPR Consent History

Please search for a Citizen Portal Account Holder. Once an account is selected a list of their GDPR consents will be shown.

neil

Name	Email Address	User Id	Action	Action On
Neil	portal19@onetestsmtp.co.uk	8249	Consent Withdrawn	09/03/2018 13:20:18
Neil	portal19@onetestsmtp.co.uk	10068	Consent Withdrawn	09/03/2018 13:47:28
Neil	portal19@onetestsmtp.co.uk	10070	Consented	09/03/2018 14:25:38

3. If required, click a **Name** in the list to display the **Consent History for User** panel.

GDPR Administration

GDPR Consent History

Please search for a Citizen Portal Account Holder. Once an account is selected a list of their GDPR consents will be shown.

neil

Name	Email Address	User Id	Action	Action On
Neil	portal19@onetestsmtp.co.uk	8249	Consent Withdrawn	09/03/2018 13:20:18
Neil	portal19@onetestsmtp.co.uk	10068	Consent Withdrawn	09/03/2018 13:47:28
Neil	portal19@onetestsmtp.co.uk	10070	Consented	09/03/2018 14:25:38

**Consent History for User**

Forename	Surname	User Id	Email Address	Address
Neil		10070	portal19@onetestsmtp.co.uk	12, Greyfriars, BEDFORD, Simshire, MK40 1HJ

GDPR Consent Statement	Action	Action On	Consent Version	Consent Published Date
<p>GDPR Consent Statement March (V2) 2018</p> <p>Version 2</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus ...</p> <p><a href="#">View full statement</a></p>	Consented	09/03/2018 14:25:38	10	09/03/2018 14:20:00
<p>GDPR Consent Statement March 2018</p> <p>Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ...</p> <p><a href="#">View full statement</a></p>	Consented	09/03/2018 13:48:53	9	09/03/2018 13:35:00

# 06 | Two Year Old Funding Administration

## Introduction to Two Year Old Funding Administration

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

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

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

The DfE ECS Endpoint includes qualifiers. A qualifier is an additional piece of information that is available via ECS when a check result comes back as Not Found. These qualifiers are interpreted and displayed to the person carrying out the check. For more information, see [Interpreting the Qualifier Codes](#) on page 42.

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

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

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

For information on how parents, carers and guardians make their two year old funding applications via the Citizen Self Service portal see [Making Applications For Two Year Old Funding](#) on page 62.

### More Information:

*One Two Year Old Funding Provider Portal Handbook* available on the [One Publications](#) website.

## Interpreting the Qualifier Codes

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

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

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

The following table shows how the qualifier is interpreted:

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

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

Administration

Resource Configuration Title

Resource Configuration description

Text Blocks

Clear resources cache

Guidance\_ECS

Default Welsh (United Kingdom)

Name	Value	
Guidance_ECS_Qualifier_ManualProcess	Further evidence is required to determine your eligibility. If you believe you qualify for this entitlement please contact your local authority.	Edit
Guidance_ECS_Qualifier_ManualProcessFoundPre	Further evidence is required to determine your eligibility. If you believe you qualify for this entitlement please contact your local authority.	Edit
Guidance_ECS_Qualifier_ManualQuery	Further evidence is required to determine your eligibility. If you believe you qualify for this entitlement please contact your local authority.	Edit
Guidance_ECS_Qualifier_NoTraceCheckData	The details entered to run a check may be incorrect. Please check, update information where appropriate and re-run the check	Edit
Guidance_ECS_Qualifier_Pending	The information to process your eligibility is not yet available and could take up to 6 weeks. If you believe your qualify for this entitlement please periodically re-run the check.	Edit

## Creating a Dummy Base (2YOF)

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

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

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

### More Information:

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

# 07 | Making Applications

## Introduction to Making Applications

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

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

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

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

Information about the parent, carer or guardian and their family is also accessed from the **Home** page. For more information, see [My Family](#) on page 60.

The parent, carer or guardian will receive messages from the local authority regarding the status of their application. For more information, see [Messages](#) on page 68.

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

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

The footer on each page displays the following links, containing information set up by the local authority:

- **About** – displays information about the Local Authority.
- **Contact Us** – displays local authority contact details such as address, phone numbers and email addresses.
- **Terms and Conditions** – displays the terms and conditions for using the Citizen Self Service portal.
- **Privacy Notice** – displays additional information.
- **Cookies Policy** – displays information of how cookies are used on the website.

### More Information:

For more information, refer to **Error! Hyperlink reference not valid.** on page 11.

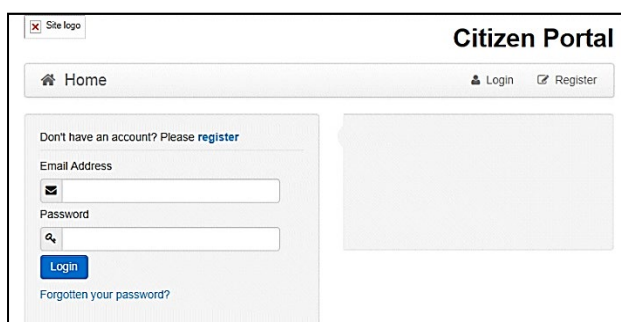
## Creating an Account

Before a parent, carer, guardian or young person can log in to the One Citizen Self Service portal, they must create an account by registering with their local authority.

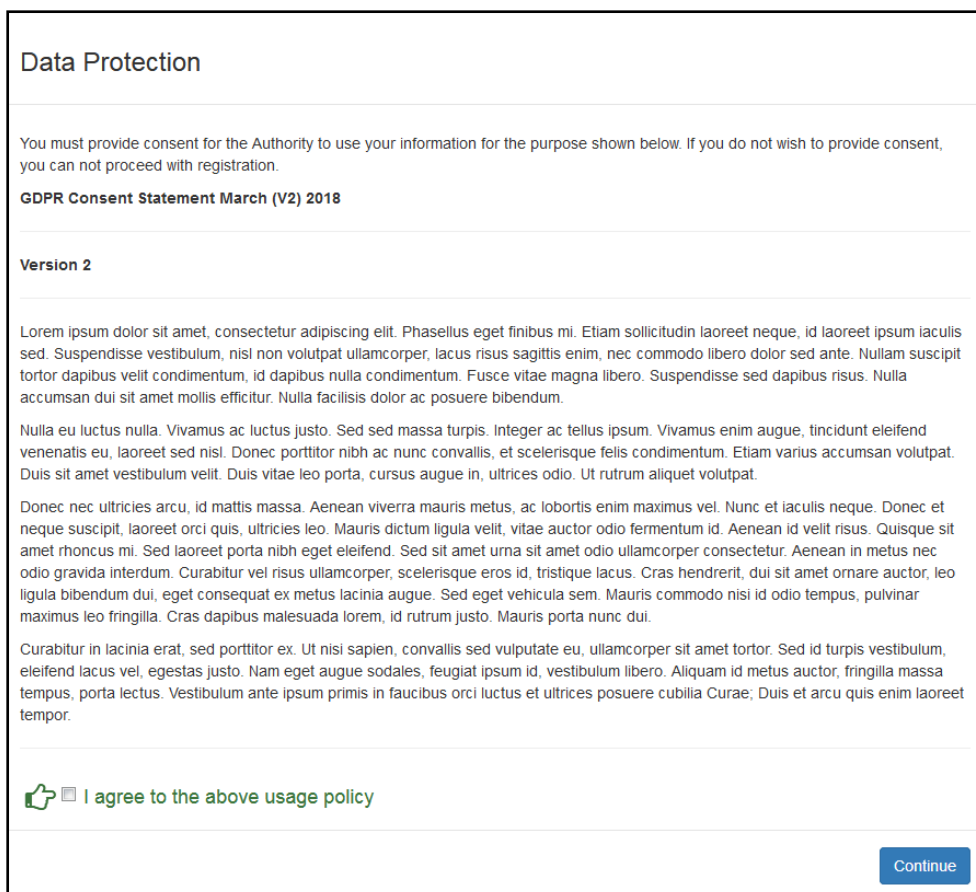
When they register, they will be asked to agree to the GDPR Consent Statement.

To register for a Citizen Self Service portal account the parent must complete the following procedure:

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



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





3. Read the contents of the statement. Select the check box to agree to the GDPR Consent Statement and click the **Continue** button to display the **Registration** page.
4. Enter the **\*Required field** security information: **Email Address, Confirm Email, Password** (click the **Show** button to view the password as you type), **Title, Forename, Surname, Gender**.

### Registration

You need to first register with us before you can use our services. Please click on the link below to register.

\* Required field

**Email Address \***

**Confirm Email \***

**Password \***  Show

**Title \***

**Forename \***

**Surname \***

**Gender \***

If you need help with your address, use the Post Office's [Postcode Finder](#).

**Find Address**

Search

5. To find your address, enter your full postcode and click **Search**.  
If you need help with your address, use the Post Offices's [Postcode Finder](#).
6. Select an address from the list. Only addresses marked as **Active** will be displayed.
  - a. If the address you have selected is incorrect, click the **Use Another Address** button to search again.
  - b. If your address is not in the list, click the **Not able to find your address?** button.

<b>House Number</b>	<input type="text" value="100"/>
<b>House Name</b>	<input type="text"/>
<b>Building Name</b>	<input type="text"/>
<b>Street Name</b>	<input type="text"/>
<b>District / Village</b>	<input type="text"/>
<b>Town</b>	<input type="text"/>
<b>County</b>	<input type="text"/>
<b>Postcode *</b>	<input type="text"/>
<b>Country</b>	<input type="text" value="Please select"/>

## Making Applications

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

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

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

<b>Home Phone</b>	<input type="text"/>
<b>Mobile Number</b>	<input type="text"/>
<b>Work Phone</b>	<input type="text"/>

- Click the **Submit Registration** button; you will receive an email asking you to activate your account by confirming your email address.
- Click the link in the email to confirm your email address and complete the registration. You can now log in to the One Citizen Self Service portal, using the password you created when you registered.

## Logging in to the Citizen Portal

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

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

2. Enter the **Email Address** you used to register for the One Citizen Self Service portal.
3. Enter your **Password**.
4. Click the **Login** button to display the **Announcements** page.

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

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

5. Click the **Continue** button to display the **Home** page.
6. If the LA has updated its **Data Protection Consent Statement**, a **Data Protection** dialog is displayed. For more information, see [Update Data Protection Consent Statement](#) on page 50.
  - i. On the **Data Protection** dialog, select the checkbox to agree to the confirmation.
  - ii. Click the **Continue** button. A confirmation message displays to conform your consent

**Important Note:** It is now possible to enable a second verification step to increase your security. For more information, see [Two Step Verification](#) on page 50.

## GDPR Update

### Update Data Protection Consent Statement

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

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

### Two Step Verification

#### Enabling Two Step Verification

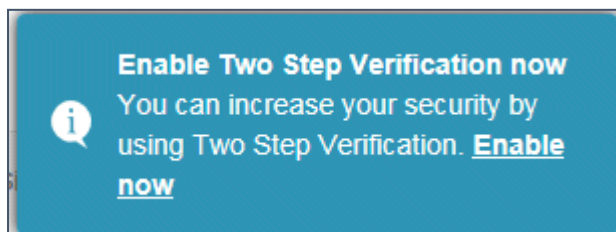
Two step verification is an additional process to increase your security when logging onto the portals. This process is mandatory if you wish to use Special Educational Needs and Disabilities (SEND).

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

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

To set up two step verification:

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



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

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

5. Click the **Save** button.  
You will be signed out and will need to sign in again.
6. Log in; this time when you log in, the following dialog is displayed:

**Verification Code sent**

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

**Your Verification Code \***

**Verify**

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

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

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

## Disabling Two Step Verification

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

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

To disable two step verification in a different module:

1. Log in to the portal for which you want to disable two step verification.
2. Select **My Account | Two Step Verification** to display the **Two Step Verification** page.

**Two Step Verification**

Two Step Verification is our way to make your data more secure.  
If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.  
Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.  
Changing your preference will sign you out, and you will need to sign in again.

**Preferred method**

No Two Step Verification

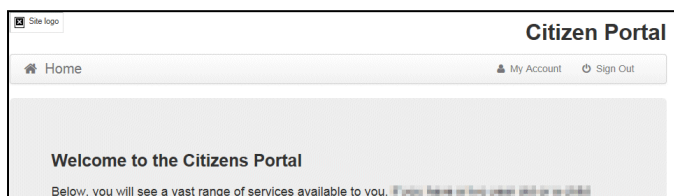
**Save**

## Making Applications

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

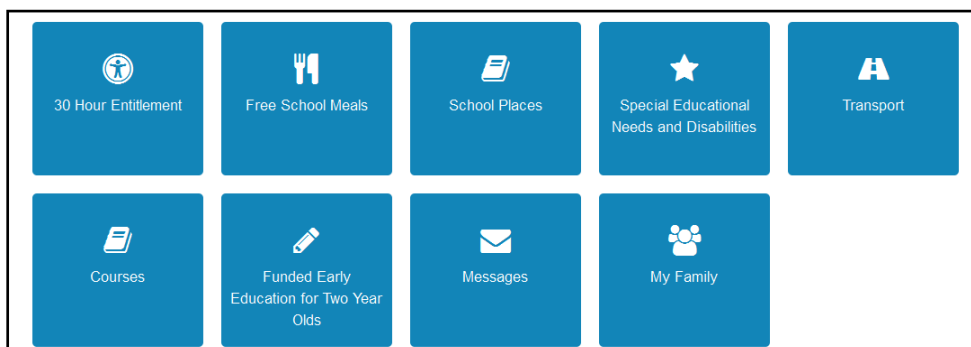
You will be signed out and will need to sign in again.

## Home Page



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

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



From here, the Citizen portal user can manage their account, check the validity of extended entitlement codes, make applications for school places, free school meals, transport, courses, funded early education for two year olds and complete special educational needs and disabilities forms. They can also view any messages from the local authority regarding their applications and make changes to their family.

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

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

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

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

For more information, see [My Account](#) on page *Error! Bookmark not defined.*

The footer on each page displays the following links, containing information set up by the local authority:

- **About** – displays information about the Local Authority.
- **Contact Us** – displays local authority contact details such as address, phone numbers and email addresses.
- **Terms and Conditions** – displays the terms and conditions for using the Citizen Self Service portal.
- **Privacy Notice** – displays additional information.

**Cookies Policy** – displays information of how cookies are used on the website.

## My Account

A Citizen Portal user can manage the following details by clicking the **My Account** link on the top of the **Home** page:

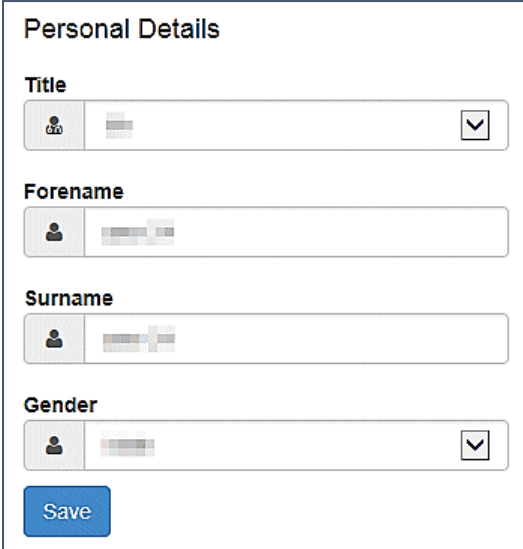
- Personal Details
- Contact Details
- Change Email Address
- Change Password
- Change of Circumstances
- Two Step Verification
- Consent History
- Withdraw Consent.

### Personal Details

To add your personal details:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Personal Details**.
4. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

## Making Applications



**Personal Details**

**Title**

**Forename**

**Surname**

**Gender**

Save

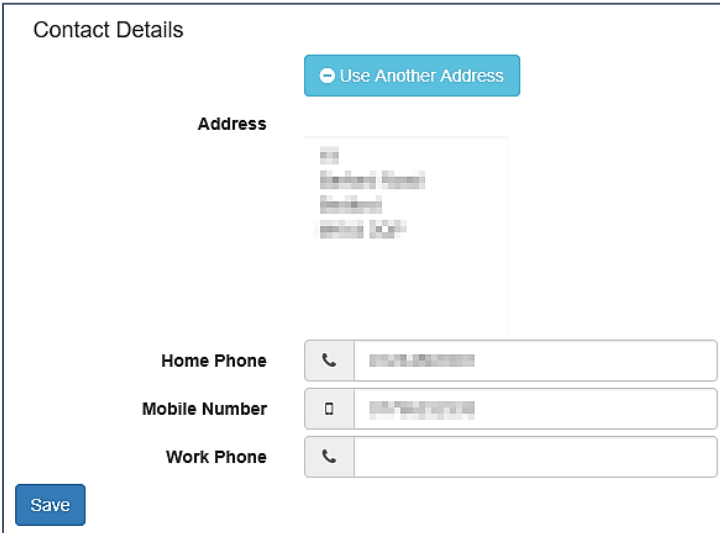
5. Click the **Save** button.

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

## Contact Details

To edit your contact details:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Contact Details**.



**Contact Details**

Use Another Address

**Address**

Home Phone

Mobile Number

Work Phone

Save

4. To edit your address, click **Use Another Address** to display the **Find Address** dialog.
5. Enter your full postcode and click the **Search** button to display a list of addresses for your postcode. Only addresses marked as **Active** will be displayed.



Contact Details

Find Address

- Amphill Road, BEDFORD, Simshire, MK42 9JP
- Flat 1, 1-3, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP
- 100, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP
- 101, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP
- 102, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP

Not able to find your address?

Home Phone

Mobile Number

Work Phone

- a. Select your address from the list (you may need to scroll down).  
There is no limit to the number of addresses that are displayed in the search results list.
- b. If your address is not in the list, click the **Not able to find your address?** button.

Enter the new address details. Click in a field to display the relevant tooltip.

Contact Details

House Number

House Name

Building Name

Street Name

District / Village

Town

County

Postcode

Country

Home Phone

Mobile Number

Work Phone

6. Click the **Save** button

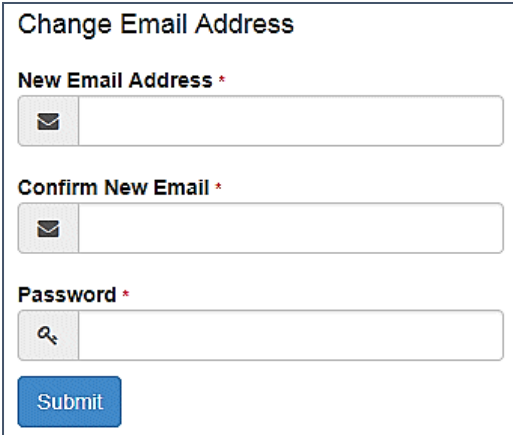
## Change Email Address

To change your email address:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Change Email Address**.
4. The following warning is displayed:

Please be advised that you will be signed out of the system and an email will be sent to your new email address containing instructions. You will not be able to log back into the system until you have followed the instructions. Please ensure the email address supplied is correct.

5. Click the **Next** button.
6. Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.



Change Email Address

New Email Address \*

Confirm New Email \*

Password \*

Submit

7. Click the **Submit** button.

## Change Password

To change your password:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Change Password**.
4. Enter your **Current Password**.

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

5. Enter your **New Password**.

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

6. Click the **Submit** button.

## Change of Circumstances

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Change of Circumstances**.

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

4. Click [Contact us](#) to open an email.
5. Click the **Back** button to return to the **Home** page.

## Two Step Verification

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

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

### Enabling Two Step Verification

To set up two step verification:

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

Two Step Verification

---

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

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

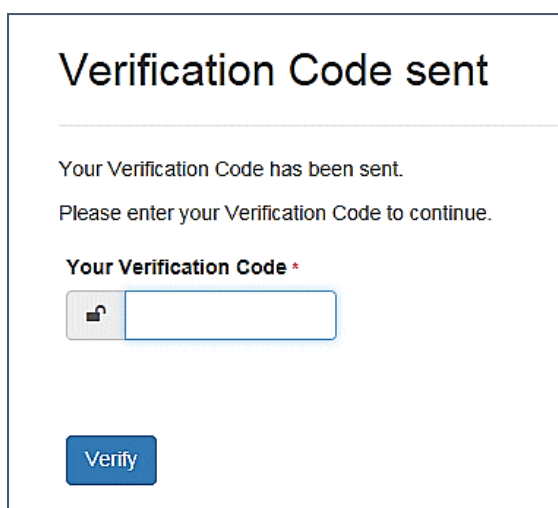
Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled.

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

**Preferred method**

Email

4. To receive a verification code to your registered email address, select **Email** from the **Preferred method** drop-down.
  5. Click the **Save** button.
- You will be signed out and will need to sign in again.
6. Log in; this time when you log in, the following dialog is displayed:



The screenshot shows a white rectangular box with a thin black border. At the top, the text "Verification Code sent" is displayed in a large, bold, black font. Below this, a horizontal line separates the header from the main content. The main content consists of the following text: "Your Verification Code has been sent." followed by "Please enter your Verification Code to continue." Below the text is a label "Your Verification Code \*" in bold. Underneath the label is a text input field with a small lock icon on the left side. At the bottom of the box is a blue button with the word "Verify" written in white.

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

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

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

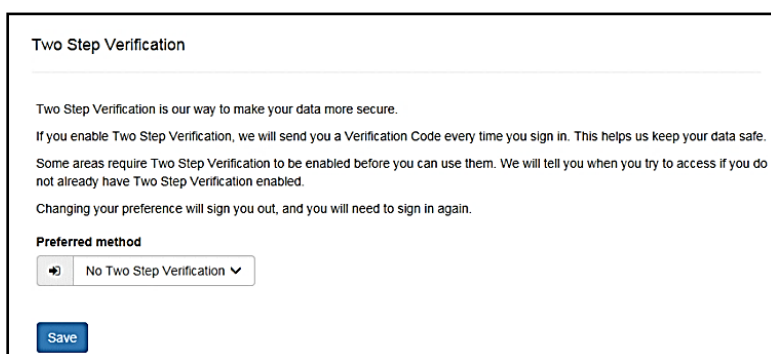
## Disabling Two Step Verification

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

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

To disable two step verification:

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



The screenshot shows a white rectangular box with a thin black border. At the top, the text "Two Step Verification" is displayed in a bold, black font. Below this, a horizontal line separates the header from the main content. The main content consists of the following text: "Two Step Verification is our way to make your data more secure." followed by "If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe." Below this is another line of text: "Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you try to access if you do not already have Two Step Verification enabled." Below that is a final line of text: "Changing your preference will sign you out, and you will need to sign in again." Below the text is a label "Preferred method" in bold. Underneath the label is a drop-down menu with a small arrow icon on the left and the text "No Two Step Verification" followed by a downward-pointing chevron. At the bottom of the box is a blue button with the word "Save" written in white.

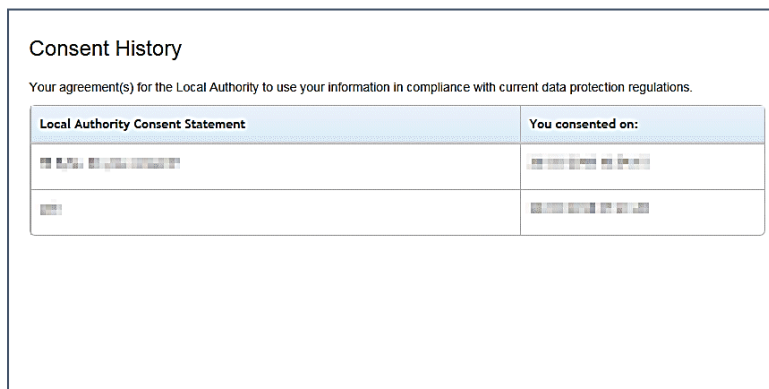
2. Select **No Two Step Verification** from the **Preferred method** drop-down.
3. Click the **Save** button.

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

## Consent History

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

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Consent History** to display the **Consent History** page.

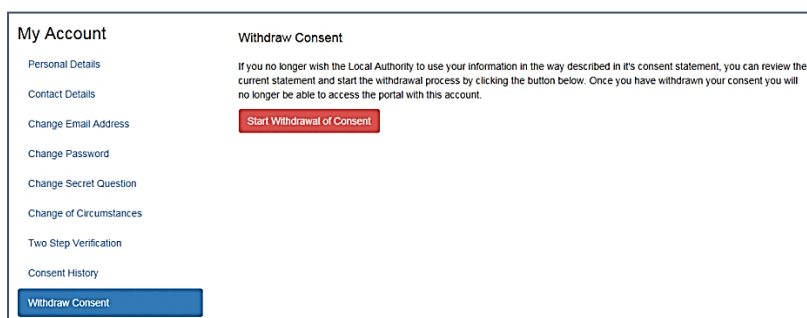


This is a read-only page.

## Withdraw Consent

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

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Withdraw Consent** to display the **Withdraw Consent** page.



4. Click the **Start Withdrawal of Consent** button to display the **Data Protection** dialog.
5. The dialog displays the consent statement alongside the following message:  

You have previously agreed to the authority's most recent Data Protection Consent Statement.  
 If you wish to withdraw your consent, click the withdraw button below.
6. Click the **Withdraw my consent** button to display the **Decline** dialog.  

This is a final warning that once you have withdrawn your consent for the LA to use your information, you will not be able to access your Citizen Portal account.
7. If you do wish to withdraw your consent, click the **Withdraw my consent** button. The following message is displayed:

## Making Applications

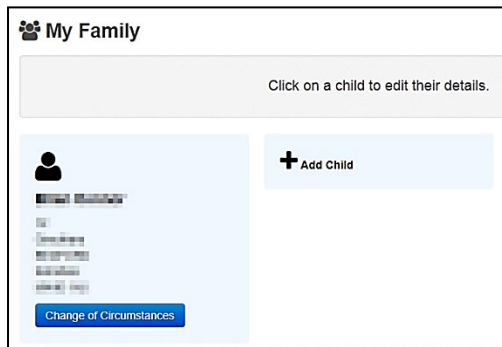
You are now being logged out from your Citizen Portal account.

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

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

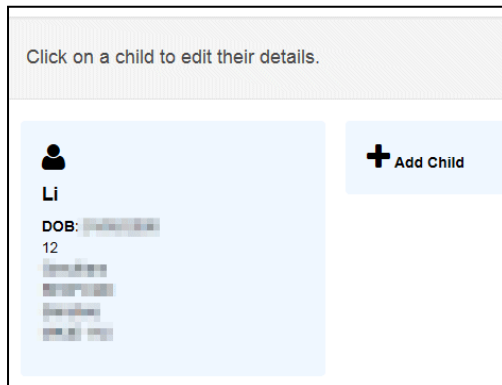
## My Family

The **My Family** area of the **Home** page displays the details about the parent, carer or guardian making an application.



Clicking the **Change of Circumstances** button displays a message from the local authority to contact them if any circumstances change, as this may affect their application.

Any existing children are displayed next to the parent, carer or guardian.



Click on a child to view or edit their details

Click the **Add Child** button to add another child to the family's application.

### More Information:

For more information, refer to [Adding a Child](#) on page 61.

## Adding a Child

To add a child to a parent’s account:

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

Forename \*

Middle Name

Surname \*

Gender \* Please select a gender

Date of Birth \*

Current School \* Please Select Current School

Relationship to Child \* Please select

Your relationship to this child (i.e. you are the Father of this child)

Parental Responsibility \*  Yes  No  
If you have legal responsibility for this child, select Yes

Select Address \*

[Click to add new address](#)

Cancel Add Child

2. Enter the required information about the child.
  - a. If the child’s address is listed, then select the address.
  - b. If the child lives elsewhere, select the **Click to add new address** button to display the **Find Address** dialog.
    - i. Enter the full **Postcode** and click **Search** to display the list of addresses matching your postcode. Only addresses marked as **Active** will be displayed.

Contact Details

Find Address

Amphill Road, BEDFORD, Simshire, MK42 9JP

Flat 1, 1-3, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP

100, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP









101, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP

102, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP

[Not able to find your address?](#)

- ii. Select the address (you may need to scroll down).
- iii. If your address is not listed, click the **Not able to find your address?** button.
- iv. Enter the new address details. **Postcode** is mandatory.

## Making Applications

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

3. Click the **Add Child** button to save the details.

The child is added to the **My Family** area, ready for an application to be made.

**NOTE:** The maximum number of characters for a child's forename is 15, for a midname it is 25 and for a surname it is 30. If you exceed these levels, a message is displayed asking you to contact your local authority if you need to enter a name that is longer than the field allows.

## Making Applications For Two Year Old Funding

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

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

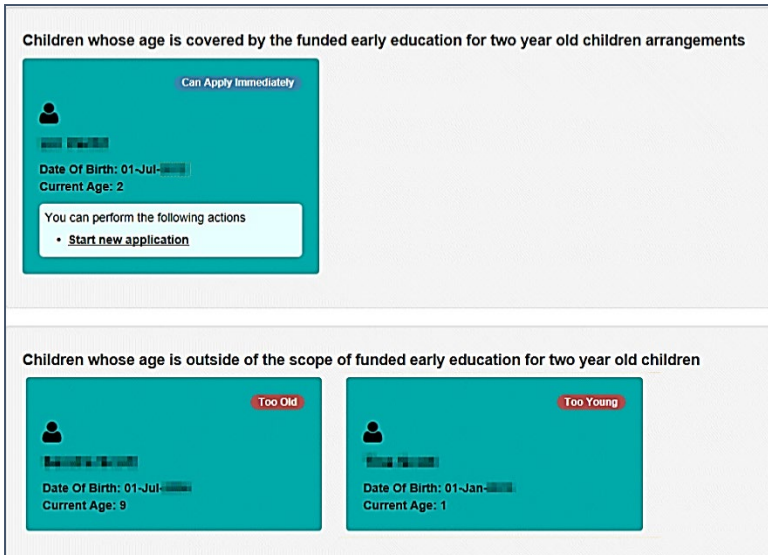
To make an application for two year old funding, the parent completes the following procedure:

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

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

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



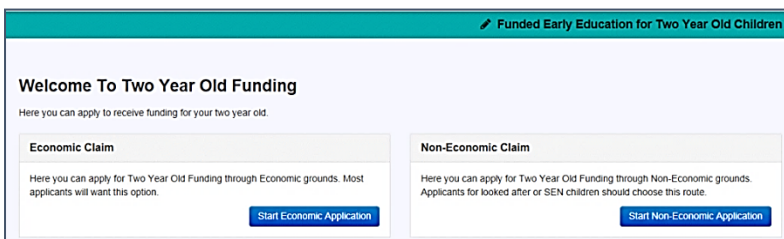


**NOTE:** The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | TYOFunding | Two Year Old Funding | EligibleChildrenTitleText and IneligibleChildrenTitleText.**

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

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

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



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

For more information, see:

[Making an Economic Application](#) on page 64.

[Making a Non-Economic Application](#) on page 67.

**NOTE:** The text for the above page is edited via **One v4 Online | Citizen Portal Admin | Home | Administration | General Administration | Edit Resources | Resource Configuration Title | Provider Two Year Old Funding | Display Attribute\_TaskCodeEconomicClaimHelp/DisplayAttributeTaskCodeNonEconomicClaim and One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Resource Configuration Title | Provider Markdown | Economic ApplicationPanelContent/NonEconomicApplicationPanelContent.**

## Making an Economic Application

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

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

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

The screenshot shows a web application interface for 'Funded Early Education for Two Year Old Children'. At the top, there is a navigation bar with four steps: Step 1 (Personal Information), Step 2 (Summary), Step 3 (Give Consent), and Step 4 (Results). The current step is Step 1. Below the navigation bar, the title 'Personal Details' is displayed. A message states: 'Please provide the following information. This is required by DWP to check whether you are eligible for Two Year Old Funding.' The form contains several input fields: 'DateOfBirth' (01-July-2014), 'NationalInsuranceNumber' (e.g. AB123456C) with a 'Please enter either:' label, 'NationalAsylumSeekersNumber' (e.g. 13 / 07 / 56789) with an 'Or' label, 'Surestart ID', 'AddressLine', 'HomePhone', 'MobilePhone', and 'Gender' (Male). A blue notification box says: 'If your details are not correct, please navigate to the Contact Details section using the My Account link in the navigation bar'. At the bottom, there is a 'Back' button and a 'Continue' button.

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

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

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

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

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

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

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



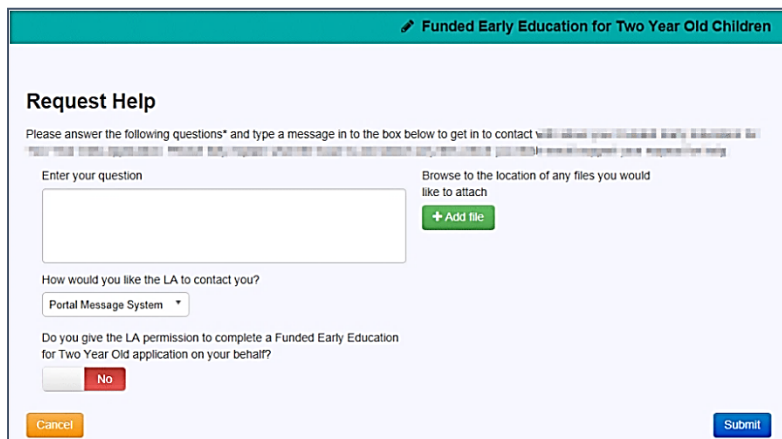
You can click the **View most recent application** link to see the **Application Summary** details.

## Requesting Help

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

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

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



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

## Making a Non-Economic Application

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

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

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

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

2. Select the criterion which applies to the application.

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

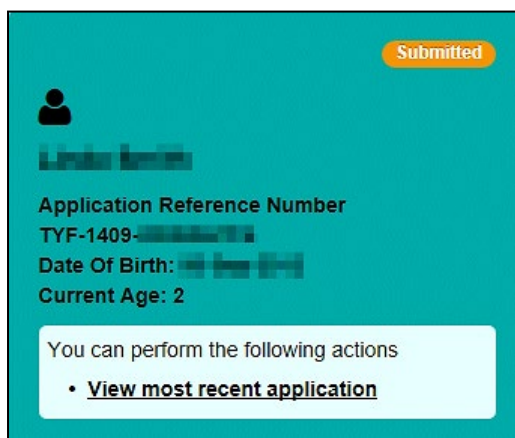
Files can be attached as additional evidence.

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

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

**Markdown | Text Blocks | TYOFunding\_NonEconomic Submitted / TYOFApplication Reference Heading | TYOFEligibilityStatusFurtherInformation.**

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



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

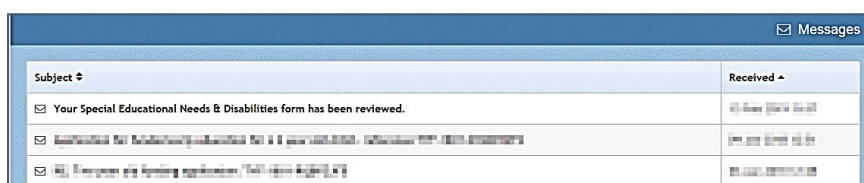
## Messages

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

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

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

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



- Click the individual message to display the contents.
- If information is required to complete an application, click the link to the form.

## Responding to Requests

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

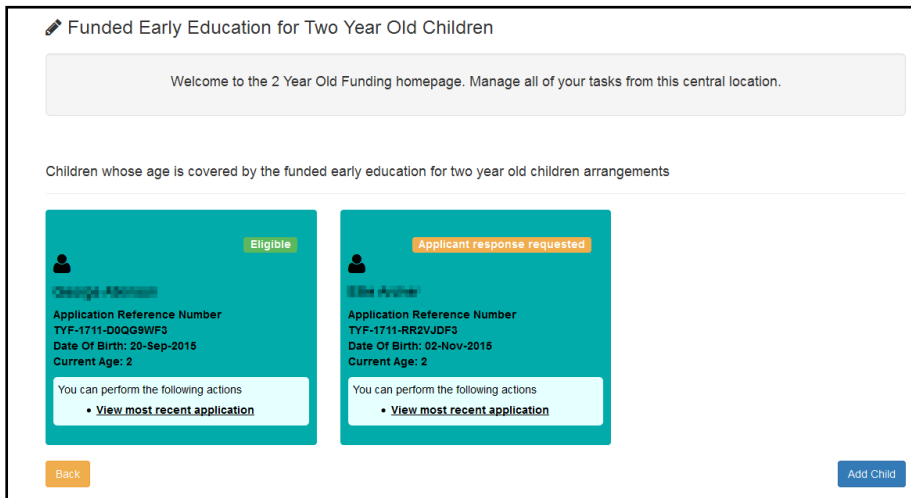
### More Information:

*One Two Year Old Funding Provider Portal Handbook* available on the [One Publications](#) website.

To reply to a request:

- Select **Citizen Portal | Home | Funded Early Education for Two Year Olds** to display your current applications on the welcome page. If the Local Authority has requested information or

evidence, the status **Applicant response requested** is displayed on the application as shown in the following graphic:



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

## Making Applications

Funded Early Education for Two Year Old Children

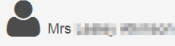
### Application Summary

[Print this page](#)

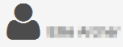
#### Application Information

Reference Number	TYF-1711-RR2VJDF3
Claim Type	Non-economic
Current Status	Applicant response requested
User Consent	Yes

#### Applicant Details

	
Gender	Female
Address	4, Grand Street, Mangrove, Melbourne, VIC 3122
Parental Responsibility	Yes
Relationship	Foster Mother

#### Child Details

	
Gender	Female
Date of Birth	02-Nov-2015

#### Non-economic Criteria

Adoption, Residence Order or Special Guardianship

Details you provided to support the application:

Adoption details

#### Messages

09/11/2017 11:34:55 : RE: Two year old funding application: TYF-1711-RR2VJDF3

Please send a copy of the adoption notice

Please provide evidence text:

Please provide attachment:

[+ Add file](#)

[Cancel](#) [Reply](#)

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

#### Messages

09/11/2017 11:34:55 : RE: Two year old funding application: TYF-1711-RR2VJDF3

Please send a copy of the adoption notice

Please provide evidence text:

Evidence text abcdefg

Please provide attachment:

[+ Add file](#)

[Remove](#) [Browse...](#) [Open File Selection dialog](#) [2017.docx](#)

[Cancel](#) [Reply](#)



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

Funded Early Education for Two Year Old Children

Welcome to the 2 Year Old Funding homepage. Manage all of your tasks from this central location.

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

Child Name	Status	Application Reference Number	Date Of Birth	Current Age	Actions
Shayla Adams	Eligible	TYF-1711-D0Q9WF3	20-Sep-2015	2	<a href="#">View most recent application</a>
Ellie Archer	Submitted	TYF-1711-RR2VJDF3	02-Nov-2015	2	<a href="#">View most recent application</a>

Back Add Child

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