



Early Years - Thirty Hour Entitlement 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 Active 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 Inactive, the address will still be displayed in the area that it has been used, eg My Account Contact Details, applications, etc.</p> <p>V4 online Administration System Administration Address Management Manage Addresses</p> <p>New functionality has been added to manage addresses. This includes making them active/inactive.</p>
Spring 2020	3.71	<p>Site Logo and Header text</p> <p>Portal administrators can now configure the site logo and header text so that they do not get overwritten during upgrades.</p> <p>Administration General Administration Edit Resources</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: https://www.local-authority.gov.uk/en/CitizenPortal https://www.local-authority.gov.uk/cy/CitizenPortal</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
Autumn 2019	3.70	<p>Thirty Hour Share Filter</p> <p>The Thirty Hour Share filter on Citizen Portal has been amended to not display postcodes for providers with the service type of Childminder</p>
August 2019	3.69.007	<p>Changes have been made to the Find Address functionality throughout the One Citizen Portal for this hotfix:</p> <ul style="list-style-type: none"> ■ When registering for a Citizen Portal account, a link is available to the Post Office Postcode Finder website to help you with your address. ■ A <u>full</u> postcode must be used to search for an address. ■ Only addresses matching the <u>full</u> postcode are displayed in the search results. ■ If the address you require is not on the LA's database, a Not able to find your address? button is available to add the new address details. ■ You <u>must</u> use the Search button and <u>not</u> the Enter key to search for an address. ■ There is no limit to the number of addresses that are displayed in the search results list. <p>A parent or guardian can add a child (and address) directly within the Thirty Hour Entitlement Portal, without having to navigate back to the main My Family page.</p> <p>See Adding a New Child on page 48</p>
Summer 2019	3.69	<p>The Secret Question and Answer have been removed from the Registration, My Account and Forgotten Password processes to simplify the login process.</p> <p>A Show 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 Personal Details pages.</p> <p>The Address Selection process has been improved; users can now select an address from a known list instead of adding it manually.</p> <p>A partial postcode search has been introduced to improve the Find Address process. An address can now be found using the Street name.</p>

Date	Release	Description
		If an address is changed, a validation message is displayed on any of the Contact Details pages.
		The 'white-space' has been trimmed on all form submissions, e.g "Ian" and "Ian ". This will prevent conflicts when matching data.

02 | Citizen Self Service Admin

Overview

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

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

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

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

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

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

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

More Information:

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

Using this Handbook

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

- Local Authority
 - User Management.
- General Administration
 - Portal Configuration
 - Template Management
 - Edit Resources
 - Cache
- GDPR Administration.

Chapter 5 describes how the parent, carer or guardian uses the portal to check the validity of their 30-hour code and share the results with their chosen providers.

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.

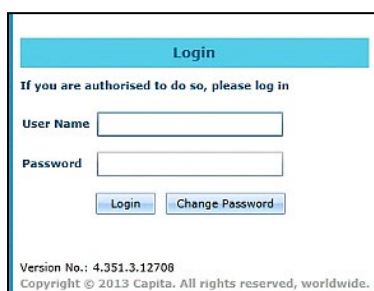
More Information:

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

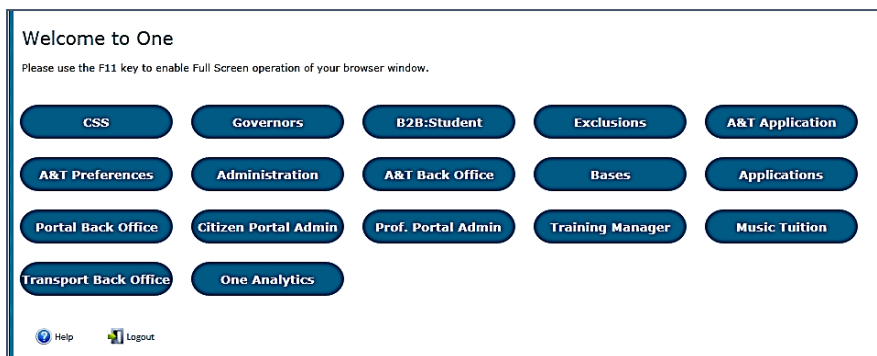
To log in to One v4 Online, you need to obtain a licence key for the required v4 Online module from Capita. You must also be set up as a user in One v4 Client.

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,

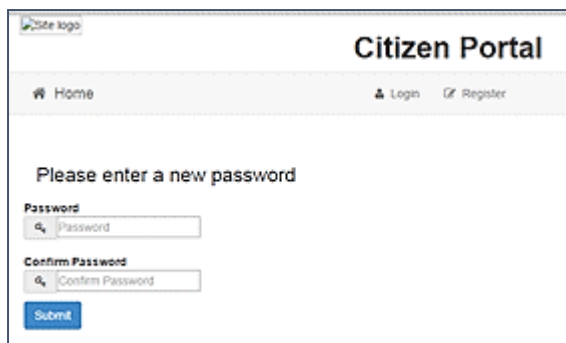
[redacted] Administrator

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 navigation bar with 'Home', 'Login', and 'Register' links. Below this, the main heading is 'Please enter a new password'. There are two input fields: 'Password' and 'Confirm Password', each with a magnifying glass icon on the left. A blue 'Submit' button is located at the bottom left of the form area.

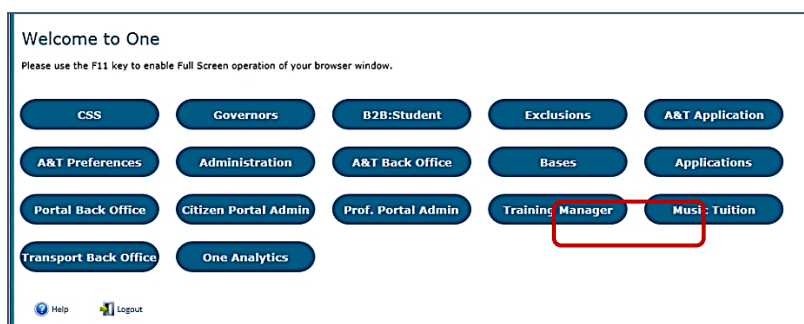
4. Enter your new **Password**. Passwords are case sensitive.
5. Enter your new password again in the **Confirm Password** field.
6. Click the **Submit** button. A message confirms that you have successfully changed your password.
7. Click the **Login** button to log in to the Citizen Portal with your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

Logging in to Citizen Portal Admin

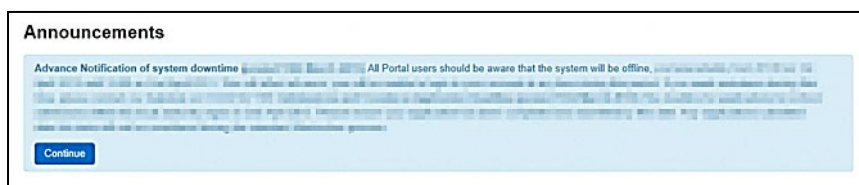
The **Citizen Portal Admin** functionality is available in One v4 Online. To use the Citizen Portal Admin you must have an email address, be set up as a user and belong to a user group in One v4. Your System Administrator will have set up the Citizen One Portal licence key and your permissions via **v4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

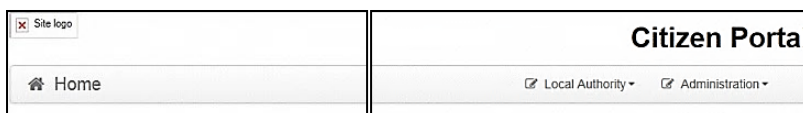
The Citizen Portal Home Page

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

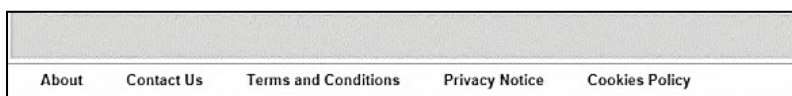
- **Administration** – for more information, see the [Home | Administration Page](#) section on page 12.
- **GDPR Administration**
- **Local Authority** – for more information, see the [Home | Local Authority Page](#) section on page 12.

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 | 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 **User Management** button displays the **User Management** page. For more information, see [User Management \(Local Authority\)](#) on page 12.

User Management (Local Authority)

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

Email Address	First Name	Surname	Confirmed	View Details	Action
[REDACTED]@mail.com	[REDACTED]	[REDACTED]	✓	View Details	Change Email Address Reset Password
[REDACTED]@mail.com	[REDACTED]	[REDACTED]	✓	View Details	Change Email Address Reset Password
[REDACTED]@mail.com	[REDACTED]	[REDACTED]	✓	View Details	Change Email Address Reset Password
[REDACTED]@mail.com	[REDACTED]	[REDACTED]	✓	View Details	Change Email Address Reset Password
[REDACTED]@mail.com	[REDACTED]	[REDACTED]	✓	View Details	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.

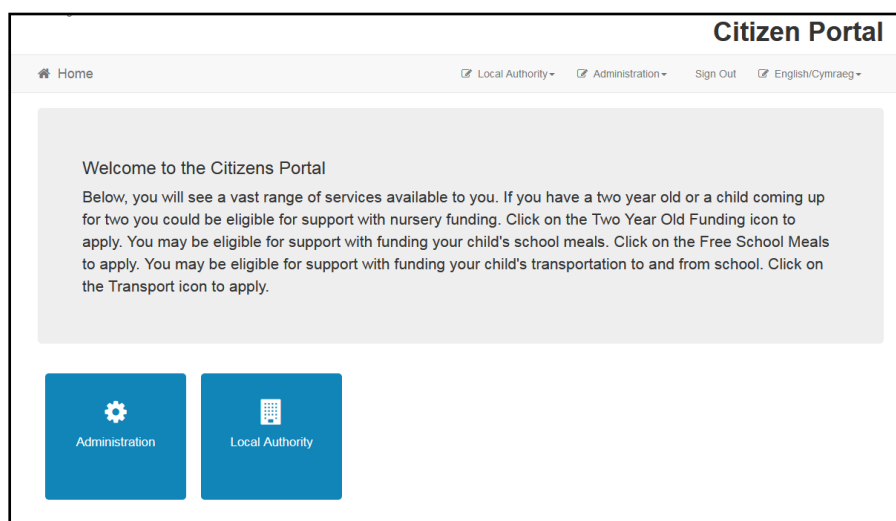
Resetting a User's Password

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

The Citizen Portal Home Page

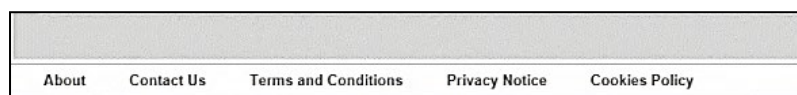


The **Citizen Portal Home** page enables you to access the following functionality:

- Administration.
- Local Authority.

These are accessed by clicking on the tile or selecting an option on the navigation bar.

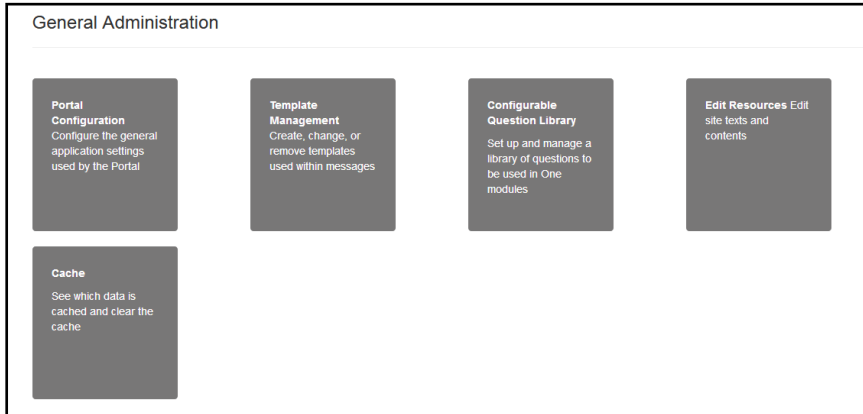
The footer displays the following links:



- **About Us** – displays information about the local authority. This text is formatted via **One v4 Online | 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 via **One v4 Online | 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 via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_TAndC**.
- **Privacy Notice** – displays additional information regarding privacy. This text is formatted via **One v4 Online | 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 via **One v4 Online | Citizen Portal Admin | Administration | General Administration | Edit Resources | Markdown | Site Notices_CookiesPolicy**.

Administration page

The **General Administration** page is accessed via **Administration | General** or by clicking the **Administration** tile. It is also 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.
- **Template Management** – Create, change or remove templates.
- **Edit Resources** – Edit site texts and contents. This enables your LA to configure the Citizen Portal with your local references and advice. Most standard text displayed within the Citizen Portal can be edited to more accurately reflect your LA's business processes.
- **Configurable Question Library** – Setup and manage a library of questions.
- **Cache** – Clear cached data.

Note: In the **Template Management** tile, a new template **Thirty Hours Free Childcare - Citizen Expression of interest** is available for selection. This template enables an email notification to be sent out to a Provider whenever a parent chooses to share their entitlement details with them.

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.

More Information:

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

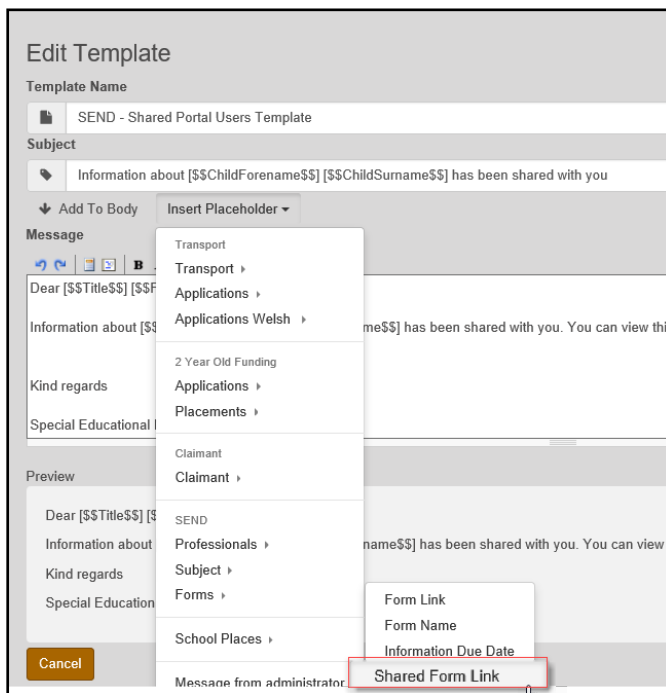
Template Management

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

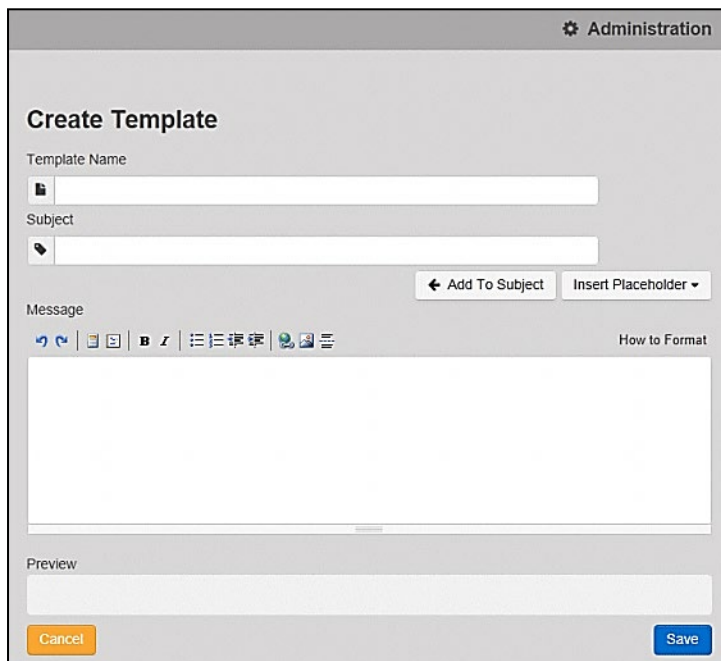
The placeholders are edited via Administration | General Administration | Edit Resources | Resource Configuration Title | Administration.

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 the 'Create Template' interface. At the top, there's a 'Administration' header with a gear icon. Below it, the title 'Create Template' is displayed. The form has two input fields: 'Template Name' and 'Subject'. Below these are two buttons: 'Add To Body' and 'Insert Placeholder'. The 'Message' section features a rich text editor with a toolbar and a 'How to Format' dropdown. The message content includes a header and a salutation: 'Dear [Title][Surname]'. Below the editor is a 'Preview' section showing the rendered message with 'Header' in bold and 'Dear [Title][Surname]' in italic. At the bottom, there are 'Cancel' and 'Save' buttons.

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

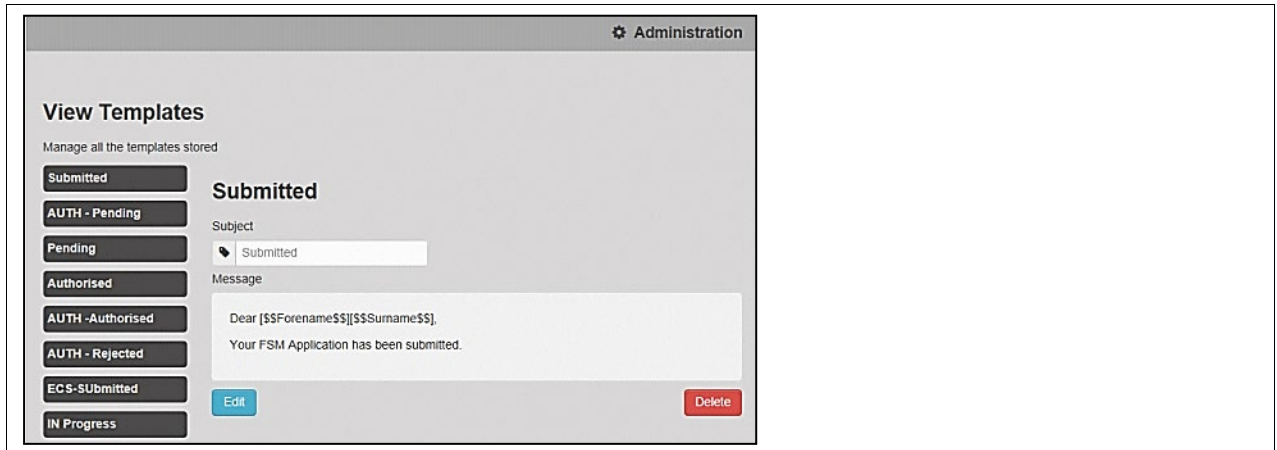
Viewing Templates

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.

The screenshot shows the 'View Templates' interface. At the top, there's a 'Administration' header with a gear icon. Below it, the title 'View Templates' is displayed. Underneath, the text 'Manage all the templates stored' is shown. A list of template categories is displayed as buttons: 'Submitted', 'AUTH - Pending', 'Pending', 'Authorised', 'AUTH - Authorised', and 'AUTH - Rejected'. At the bottom, there is a 'Create Template' button.

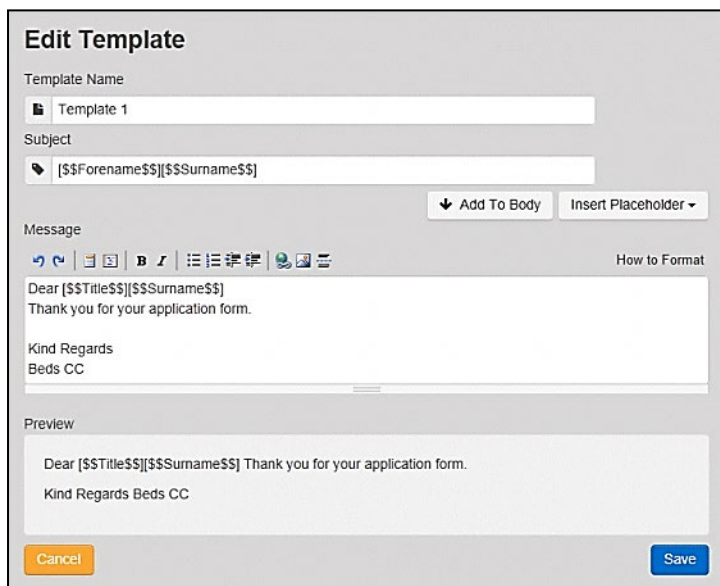
2. Click the template name to display the **Subject** and **Message** that are to be used in the message.



Editing a Template

To edit an existing template:

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

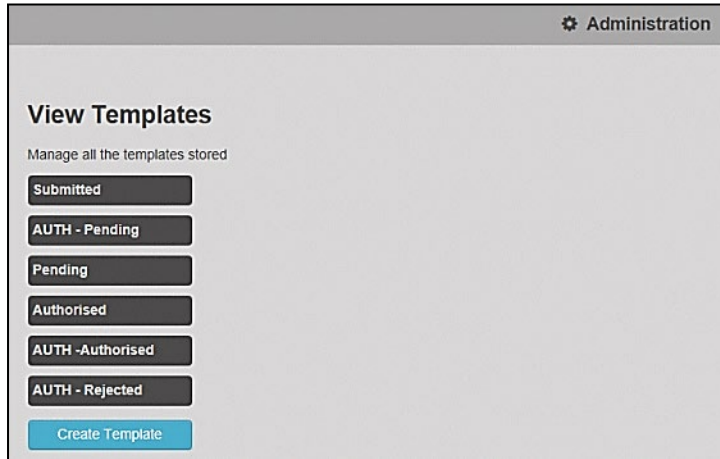


3. Edit the required fields; all of the fields on the **Edit Template** dialog can be edited.
4. Click the **Save** button.

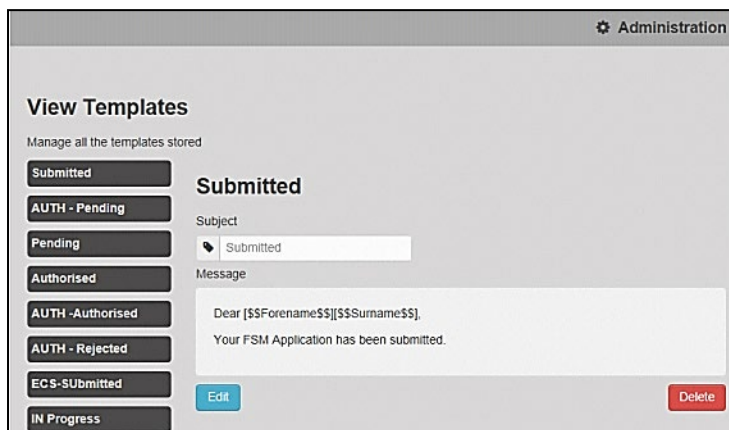
Deleting a Template

To delete an existing template:

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



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



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

Edit Resources

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

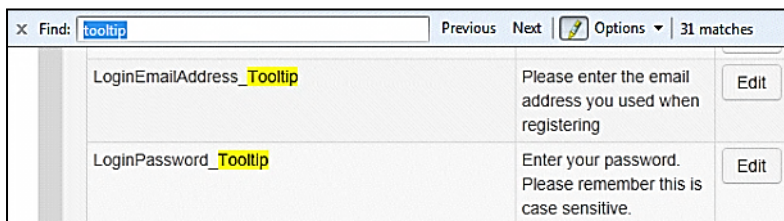
General Administration

- Home
- Home Tiles
- Local Authority
- Messaging
- SEND
- Shared
- Training Manager
- Transport
- Two Year Old Funding.

Markdown

- Text Blocks

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



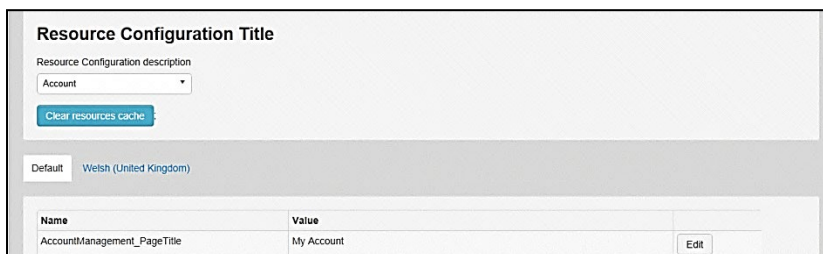
NOTE: You may need to search through more than one folder. For example, tooltips can be found in most of the resource configuration descriptions.

Editing Resource Descriptions

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

To edit the resource descriptions:

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



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

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

Resource Configuration Title

Resource Configuration description
Account

Clear resources cache

Default Welsh (United Kingdom)

Name	Value	Edit
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

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

Edit Resource Title

Edit Resource Description

Resource Type Account

Resource Key AccountManagement_PageTitle

Resource Culture en

Resource Value This is the only editable field.

Cancel Save

The following fields are read-only:

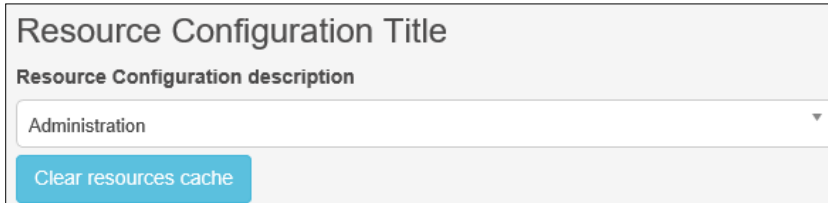
- **Resource Type** – the name of the resource configuration title.
 - **Resource Key** – the resource database name.
 - **Resource Culture** – en (English) or cy (Welsh)
- Enter your text in the **Resource Value** field.
 - Click the **Save** button to return to the **Resource Configuration Title**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

Site Logo and Header text

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

To edit the resource descriptions:

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



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

Name	Value	
CitizenPortal_HeaderText	Citizen Portal	Edit

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

Name	Value	
CitizenPortal_SiteLogo	Site logo	Edit

5. Click the **Save** button to return to the **Resource Configuration Title** page.
6. Select **CitizenPortal_SiteLogo_URL** and click the **Edit** button to display the **Edit Resource Title** dialog. Enter the URL for the location of the logo, eg: ~/Images/logo_sml.png.

Name	Value	
CitizenPortal_SiteLogo_Url	~/Images/logo_sml.png	Edit

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

Configuring Automatic Emails

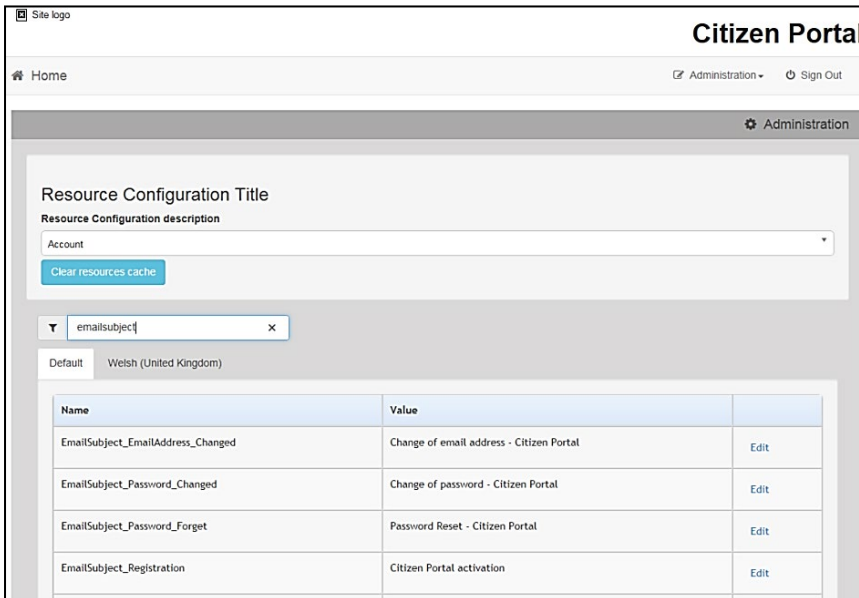
Portal administrators can now configure the text included with automatic emails, sent in response to the following actions in both the One Citizen Portal and the One Professional Portal:

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

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

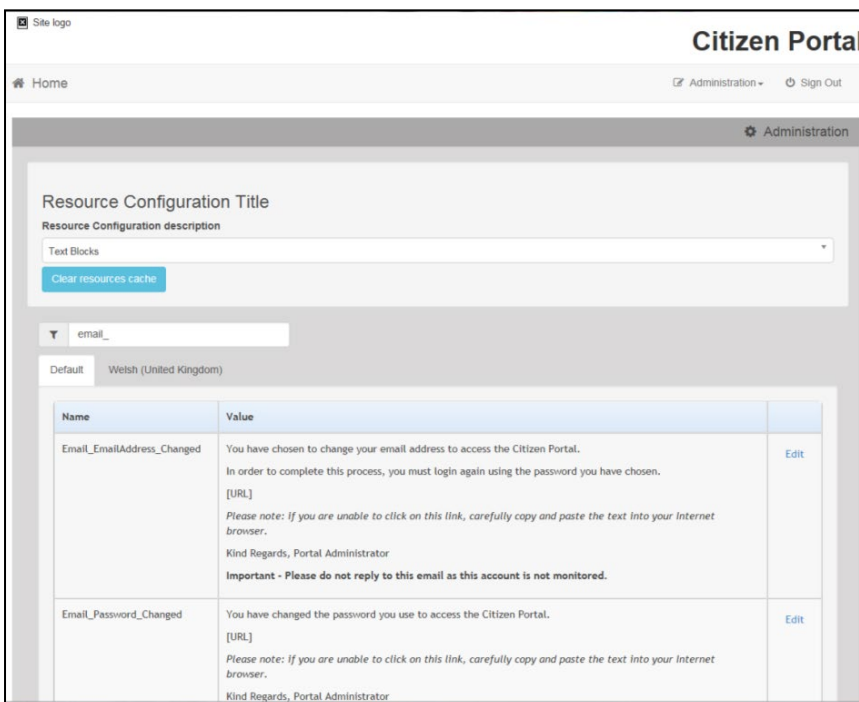
This text can be configured by the portal administrator via **Citizen Portal Administration | Administration | Edit Resources | Resource Configuration Title | Text Resources | Account**. Default text has been automatically configured for each.

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



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

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



General Administration

The configurable text block resource names are:

- Email_EmailAddress_Changed
- Email_Password_Changed
- Email_Password_Forget
- Email_Registration

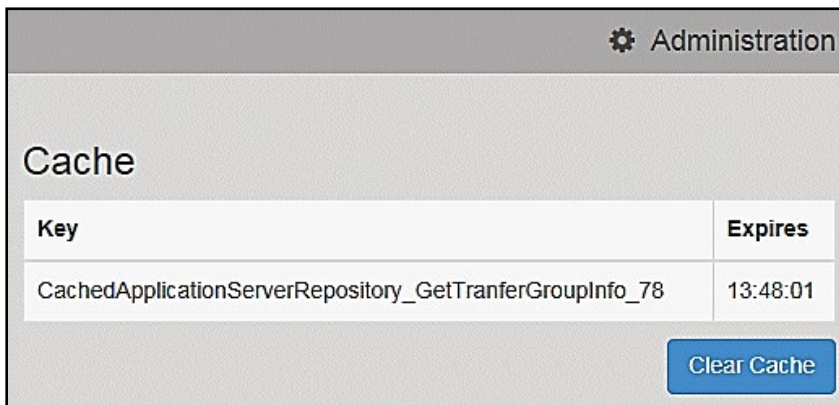
Cache

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.

ECS Settings

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

To configure the ECS settings:

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

3. To change your ECS Password, click the **Update ECS Password** button to display the **Update ECS Password** dialogue.
4. Enter the new password.
5. Confirm the new password.
6. To view the ECS System Status, click the **Test** button. An information message is displayed from the webpage.
7. Enter the following URL into the **ECS Service URI Override** field:
<https://ecs.education.gov.uk/fsm.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/carer to be submitted to **Portal Back Office** for matching or not, when an application is ineligible.

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.

General Administration

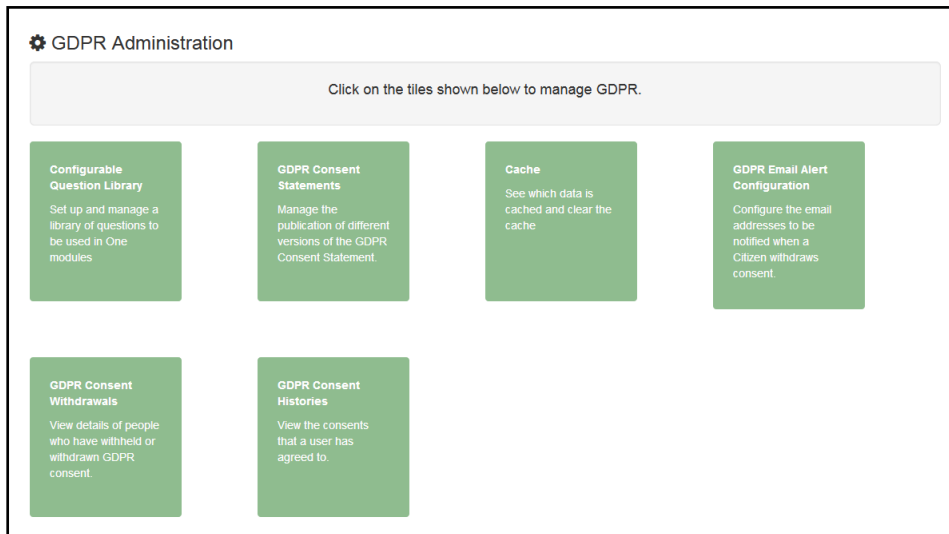
- If the switch is set to **OFF**, then the details of the Child/Carer will not be submitted to Portal Back Office.

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 Editor [CitizenAdmin-CitizenAdmin]

Save

01. Main Processes

Main Business Processes: Citizen Portal

02. Business Processes

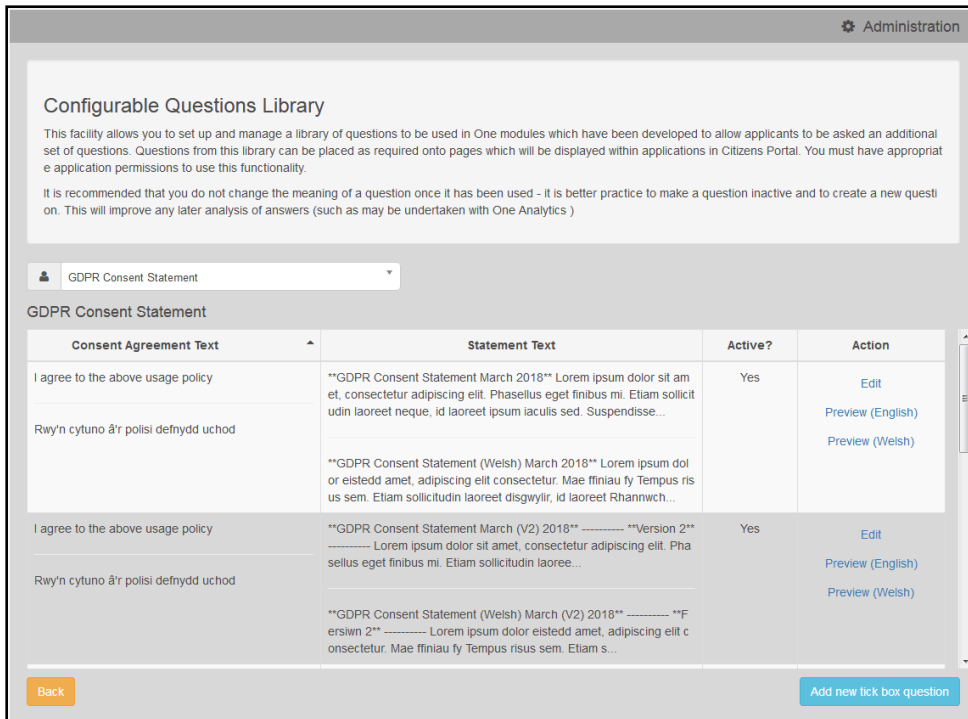
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Citizen Portal		✓		
Administration		✓		
Free School Meals		✓		
GDPR Administration		✓		
Portal Admin Access	✓			
Thirty Hour Entitlement User		✓		
Transport		✓		
User Management		✓		

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.

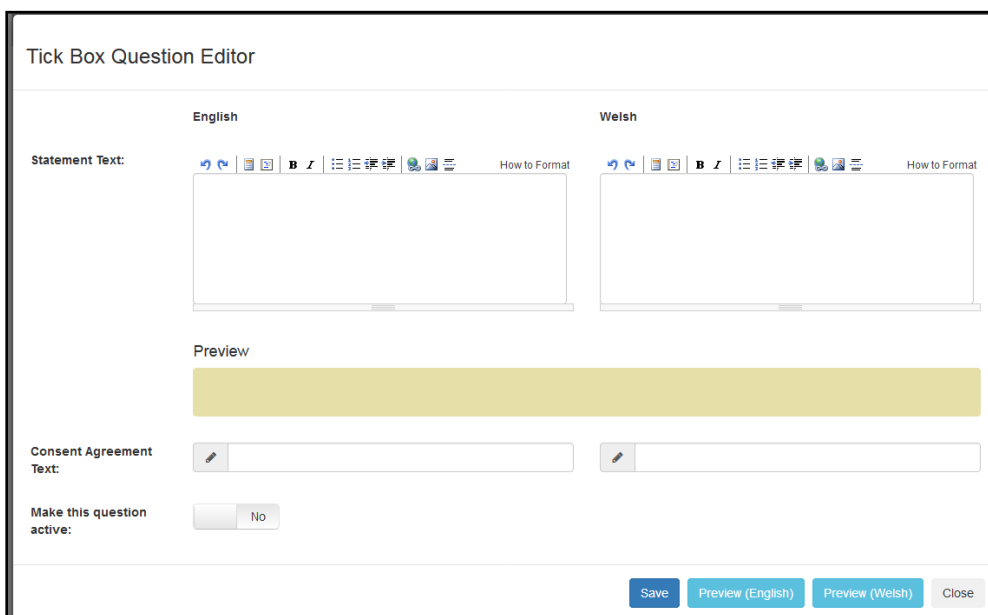
The page is accessed via **GDPR Administration | Configurable Question Library**.



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

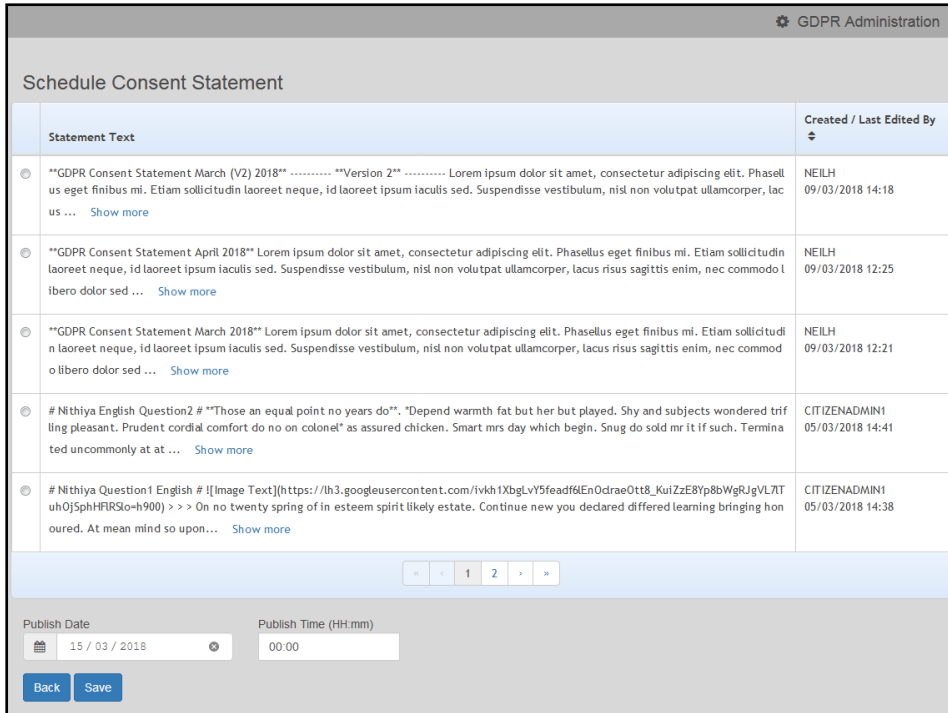
To add a new statement, select a single question from the Configurable Questions Library.

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 ... Show more	NEILH 09/03/2018 14:16	01/04/2018 00:01	11	Delete
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 ... Show more	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 ... Show more	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 ... Show more	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 ... Show more	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.

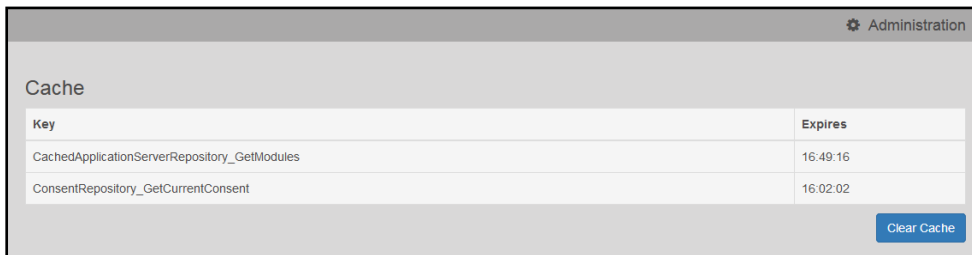


3. Select the radio button adjacent to the required statement and click the **Save** button.

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>View full statement</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>View full statement</p>	Consented	09/03/2018 13:48:53	9	09/03/2018 13:35:00

06 | Using Thirty Hour Entitlement in the Citizen Portal

Introduction to Using Thirty Hour Entitlement in the Citizen Portal

NOTE: To use this functionality, the Local Authority must have a licence for Citizen Portal 30 Hours Entitlement.

Children can be funded for extended hours if they are 3 or 4 years old. Children are entitled to extended hours funding from the start of the term after their third birthday.

The Citizen Thirty Hour Entitlement portal enables parents and carers to check the validity of their extended entitlement code. They can see personalised information such as when the child can start receiving the extended funding. They can choose to share the results of their check with providers and apply for placements.

The parent or carer can view a dashboard showing extended entitlement history for a child.

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.

The screenshot shows the Citizen Portal Home page. At the top, there is a 'Site logo' icon and the title 'Citizen Portal'. Below the title is a navigation bar with 'Home', 'Login', and 'Register' options. The main content area features a 'Don't have an account? Please register' link. Underneath are two input fields: 'Email Address' and 'Password'. A 'Login' button is positioned below the password field, and a 'Forgotten your password?' link is at the bottom left of the form area.

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.

Using Thirty Hour Entitlement in the Citizen Portal

Data Protection

You must provide consent for the Authority to use your information for the purpose shown below. If you do not wish to provide consent, you can not proceed with registration.

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 iaculis sed. Suspendisse vestibulum, nisl non volutpat ullamcorper, lacus risus sagittis enim, nec commodo libero dolor sed ante. Nullam suscipit tortor dapibus velit condimentum, id dapibus nulla condimentum. Fusce vitae magna libero. Suspendisse sed dapibus risus. Nulla accumsan dui sit amet mollis efficitur. Nulla facilisis dolor ac posuere bibendum.

Nulla eu luctus nulla. Vivamus ac luctus justo. Sed sed massa turpis. Integer ac tellus ipsum. Vivamus enim augue, tincidunt eleifend venenatis eu, laoreet sed nisl. Donec porttitor nibh ac nunc convallis, et scelerisque felis condimentum. Etiam varius accumsan volutpat. Duis sit amet vestibulum velit. Duis vitae leo porta, cursus augue in, ultrices odio. Ut rutrum aliquet volutpat.

Donec nec ultricies arcu, id mattis massa. Aenean viverra mauris metus, ac lobortis enim maximus vel. Nunc et iaculis neque. Donec et neque suscipit, laoreet orci quis, ultricies leo. Mauris dictum ligula velit, vitae auctor odio fermentum id. Aenean id velit risus. Quisque sit amet rhoncus mi. Sed laoreet porta nibh eget eleifend. Sed sit amet urna sit amet odio ullamcorper consectetur. Aenean in metus nec odio gravida interdum. Curabitur vel risus ullamcorper, scelerisque eros id, tristique lacus. Cras hendrerit, dui sit amet ornare auctor, leo ligula bibendum dui, eget consequat ex metus lacinia augue. Sed eget vehicula sem. Mauris commodo nisi id odio tempus, pulvinar maximus leo fringilla. Cras dapibus malesuada lorem, id rutrum justo. Mauris porta nunc dui.

Curabitur in lacinia erat, sed porttitor ex. Ut nisi sapien, convallis sed vulputate eu, ullamcorper sit amet tortor. Sed id turpis vestibulum, eleifend lacus vel, egestas justo. Nam eget augue sodales, feugiat ipsum id, vestibulum libero. Aliquam id metus auctor, fringilla massa tempus, porta lectus. Vestibulum ante ipsum primis in faucibus orci luctus et ultrices posuere cubilia Curae; Duis et arcu quis enim laoreet tempor.

I agree to the above usage policy

Continue

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

*** 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.

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

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

7. 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.

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

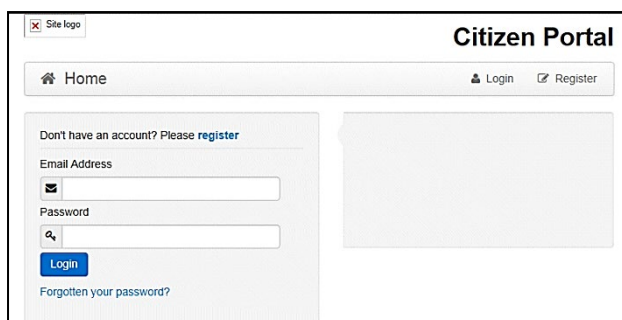
8. Click the **Submit Registration** button; you will receive an email asking you to activate your account by confirming your email address.
9. Click the link in the email to confirm your email address and complete the registration. You can now log in to the One Citizen Self Service portal, using the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

Logging in to the Citizen Portal

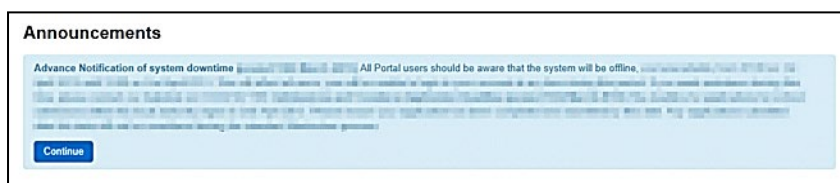
To log in to the Citizen Self Service portal, the parent completes the following procedure:

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

Using Thirty Hour Entitlement in the Citizen Portal



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.



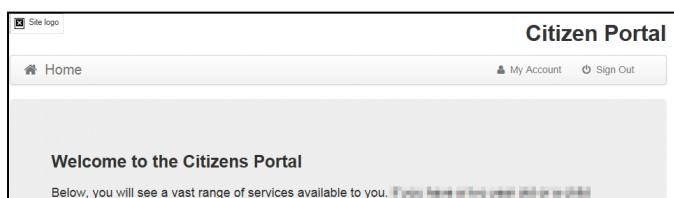
The **Announcements** page displays only if the local authority has set up any announcements regarding the portal.

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

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

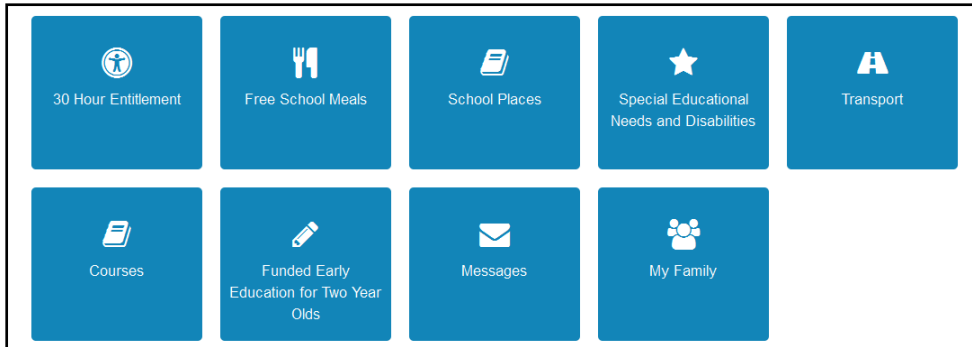
Important Note: It is now possible to enable a second verification step to increase your security. For more information, see [My Account](#) on page 40.

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

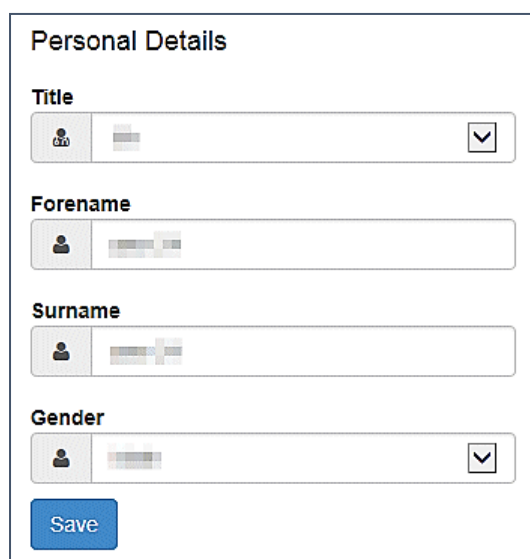
A Citizen Portal user can manage the following details by clicking the **My Account** link on the top of the **Home** page:

- 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.



The screenshot shows a form titled "Personal Details" with the following fields:

- Title:** A dropdown menu with a person icon and a downward arrow.
- Forename:** A text input field with a person icon.
- Surname:** A text input field with a person icon.
- Gender:** A dropdown menu with a person icon and a downward arrow.

A blue "Save" button is located at the bottom left of the form.

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

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

[← Use Another Address](#)

House Number	<input type="text" value="1"/>
House Name	<input type="text"/>
Building Name	<input type="text"/>
Street Name	<input type="text" value="..."/>
District / Village	<input type="text" value="..."/>
Town	<input type="text" value="..."/>
County	<input type="text"/>
Postcode	<input type="text" value="..."/>
Country	<input type="text" value="Please select"/>
Home Phone	<input type="text" value="..."/>
Mobile Number	<input type="text" value="..."/>
Work Phone	<input type="text"/>

[Save](#)

1. Click the **Save** button

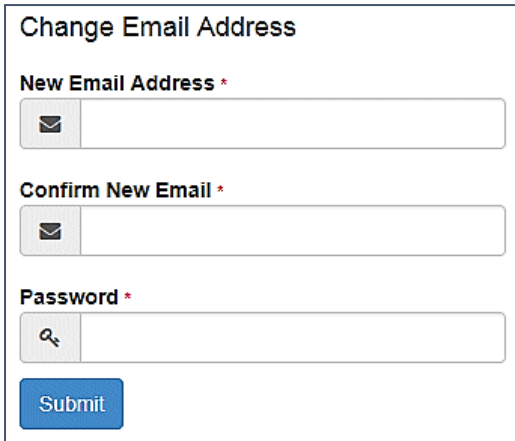
Change Email Address

To change your email address:

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

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

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



Change Email Address

New Email Address *

Confirm New Email *

Password *

Submit

7. Click the **Submit** button.

Change Password

To change your password:

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Change Password**.
4. Enter your **Current Password**.
Use the **Show** button to view your password as you type.
5. Enter your **New Password**.
Use the **Show** button to view your new password to confirm it matches your previous password..
6. Click the **Submit** button.

Change of Circumstances

1. Log onto the Citizen Portal using the email address and password you used to register.
2. Select **My Account** at the top of the page.
3. Select **Change of Circumstances**.
If you need to record a change to your circumstances, you must contact your local authority.
4. Click [Contact us](#) to open an email.
5. Click the **Back** button to return to the **Home** page.

Two Step Verification

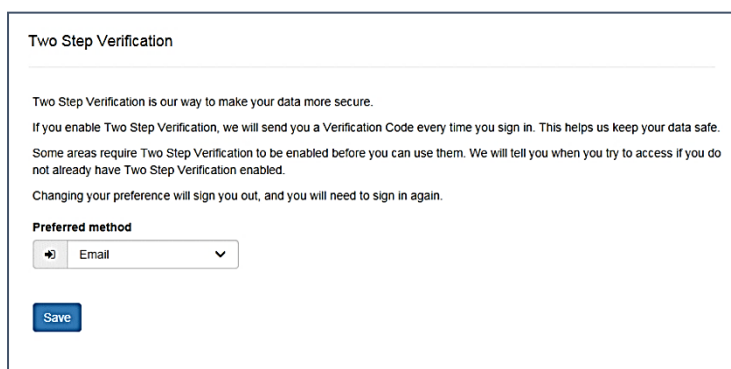
Two step verification is an additional process to increase your security when logging onto the Citizen Portal.

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

Enabling Two Step Verification

To set up two step verification:

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



Two Step Verification

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

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

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

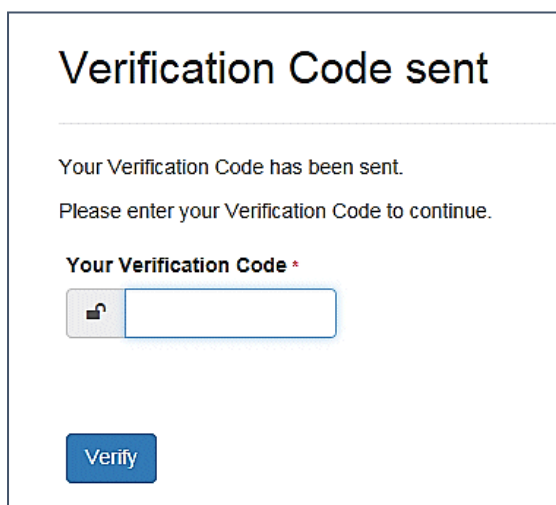
Changing your preference will sign you out, and you will need to sign in again.

Preferred method

↻ Email ▼

Save

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



Verification Code sent

Your Verification Code has been sent.

Please enter your Verification Code to continue.

Your Verification Code *

🔒

Verify

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

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

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

Disabling Two Step Verification

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

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

To disable two step verification:

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

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.

Local Authority Consent Statement	You consented on:
[Redacted]	[Redacted]
[Redacted]	[Redacted]

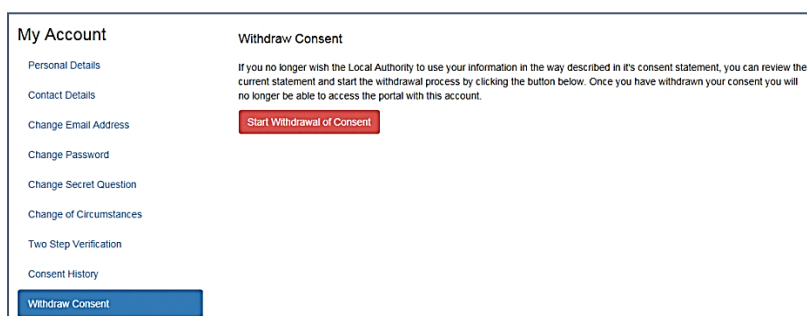
This is a read-only page.

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.

Using Thirty Hour Entitlement in the Citizen Portal

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



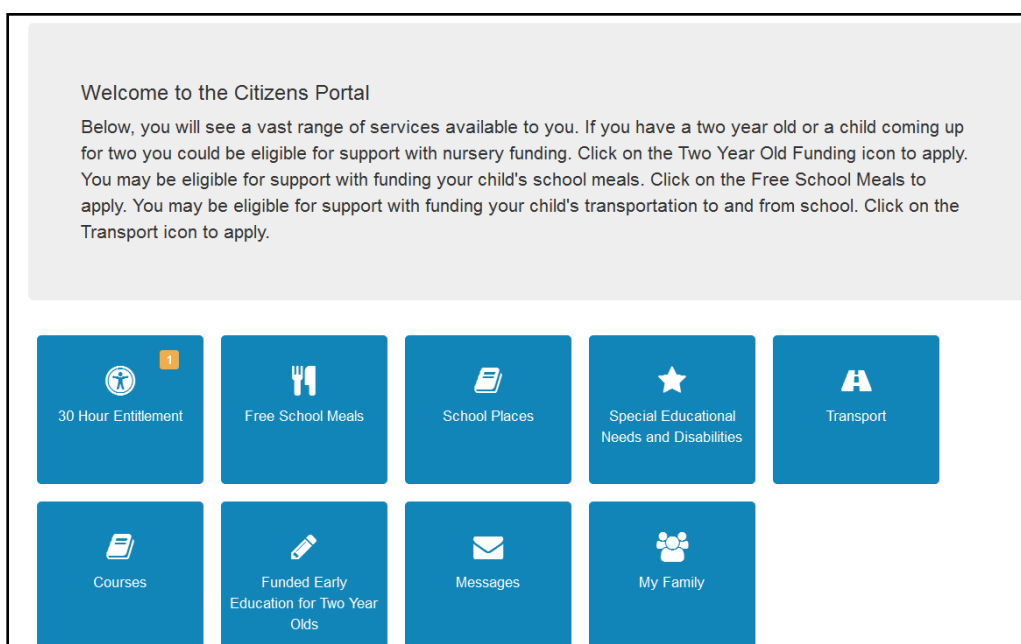
4. Click the **Start Withdrawal of Consent** button to display the **Data Protection** dialog.
5. The dialog displays the consent statement alongside the following message:

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

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

You are now being logged out from your Citizen Portal account.
You can no longer use this Citizen Portal account. If you wish to use the Citizen Portal in future to access the authority's services, you will need to register again in the Citizen Portal.
8. Click the **OK** button. The Citizen Portal is closed.

Thirty Hour Entitlement



All 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.

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

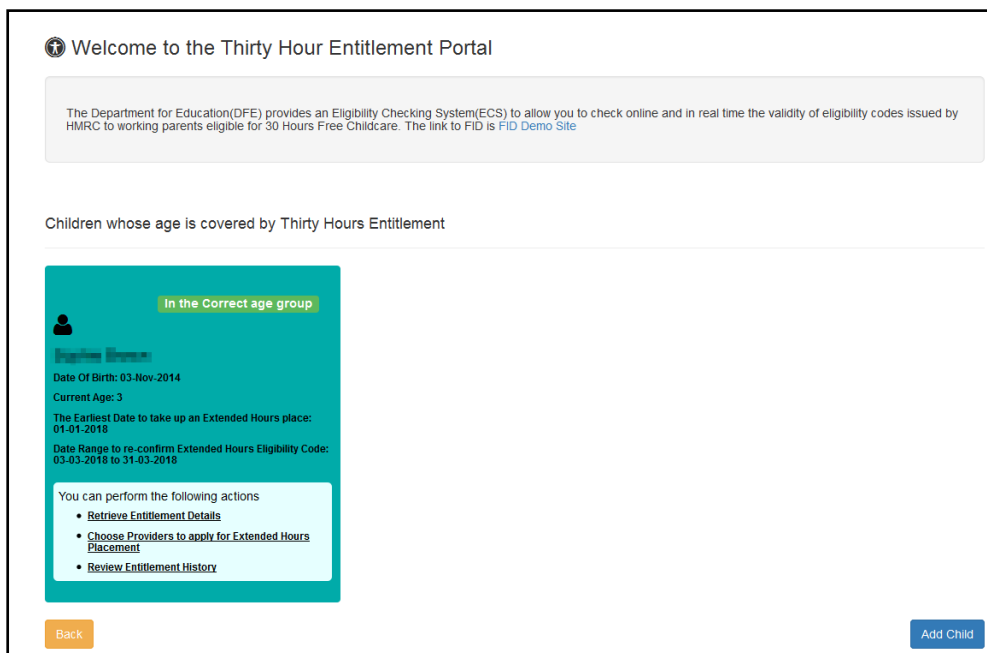
Retrieving Extended Entitlement Details

Parents, carers and guardians can use the Citizen portal to retrieve the validity details for the extended entitlement code that they have received from HMRC.

Colour coding is used on the 30 Hour Entitlement tile to display the number of children whose parents/carers need to reconfirm eligibility with HMRC. The number displayed in red indicates the number of children whose eligibility has expired. The number displayed in amber is the number whose parents need to reconfirm their eligibility codes with HMRC.

To retrieve the extended entitlement details, the parent or carer completes the following process:

1. Click the **30 Hour Entitlement** tile to display the **Welcome** page showing the details of any children who are in the correct age group for 30 hours funding.



NOTES: The **Date Range to re-confirm Extended Hours Eligibility Code** starts at the validity end date minus 28 days and ends on the validity end date.

A highlighted message is displayed on child's tile using the following colours:

Green – parents/carers are not yet in the period in which they need to reconfirm eligibility with HMRC.

Amber – parents/carers need to reconfirm their child's eligibility by visiting the HMRC website. To avoid a break in eligibility, this must be done before the validity end date displayed.

Red – if the parent/carer has reconfirmed their child's eligibility with HMRC they can update their details by clicking the **Retrieve Entitlement Details** link. If they have not reconfirmed eligibility, there may be a break in entitlement.

Using Thirty Hour Entitlement in the Citizen Portal

- If required, click the **Add Child** button to add details of a different child. For more information, see [Adding a New Child](#) on page 48.
- Click the **Retrieve Entitlement Details** link to display the **Retrieve Entitlement Dates for Extended Hours** page.

Welcome to the Thirty Hour Entitlement Portal

Retrieve Entitlement Dates for Extended Hours

Child's Forename: Sophie

Child's Surname: [Redacted]

Child's Date of Birth: 11/03/2014

Parent's NI Number: WH987654D

Eligibility Code: 12345678901

Retrieve Entitlement Dates

Back

- Click the **Retrieve Entitlement Dates** button to perform a check with the DWP and display the check results.

Welcome to the Thirty Hour Entitlement Portal

Retrieve Entitlement Dates for Extended Hours

Child's Forename: Sophie

Child's Surname: [Redacted]

Child's Date of Birth: 11/03/2014

Parent's NI Number: WH987654D

Eligibility Code: 12345678901

Retrieve Entitlement Dates

Success!

The earliest start date you can take up Extended Hours funding is 01-Jan-2018 Spring.

Please choose the Provider(s) you would like to check for a Childcare Place, entitlement Details will be shared with the chosen Providers.

This eligibility code is valid from 11-Sep-2017 to 31-Mar-2018, with a grace period to 30-Apr-2018.

You must re-confirm your eligibility code with HMRC between 03-Mar-2018 and 31-Mar-2018 in order to retain the extended hours eligibility, failure to do this could lead to loss of funding.

You can use this link to the [HMRC Childcare Account](#) when you need to reconfirm your Eligibility.

Choose Providers to share Entitlement Details

Back

- If required, click the **HMRC Childcare Account** link to sign in to your HMRC childcare account and reconfirm eligibility for extended hours funding.

Adding a New Child

The parent or carer can add details of a new child.

Citizen Portal

Home My Account Sign Out English/Cymraeg

Welcome to the Thirty Hour Entitlement Portal

The Department for Education (DfE) provides an Eligibility Checking System (ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. The link to FID is FID Demo Site

No eligible children found for Thirty Hours Entitlement

Back Add Child

Adding a Child

To add a child to a parent's account:

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

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

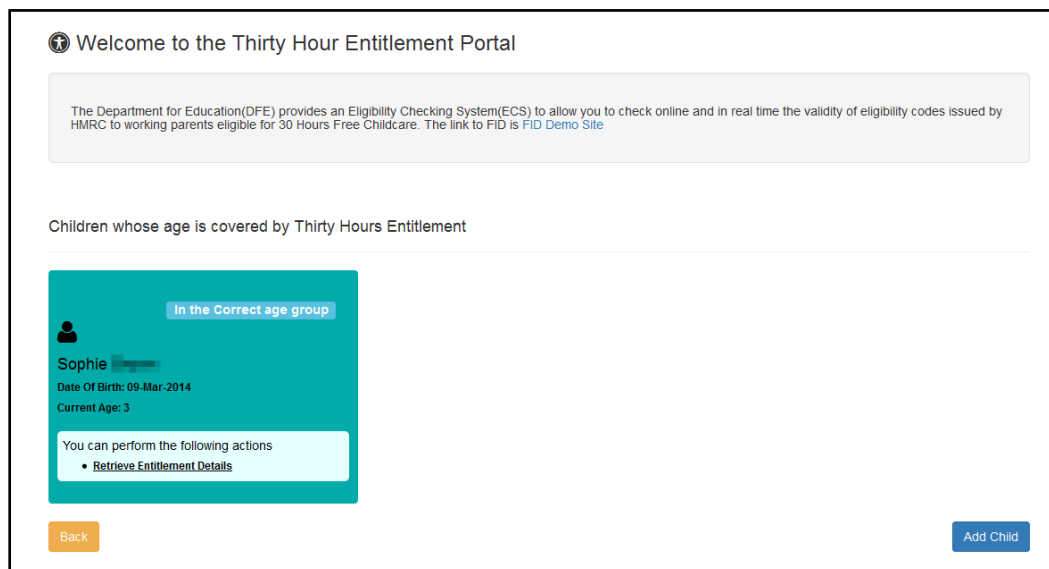
- ii. Select the address (you may need to scroll down).
- iii. If your address is not listed, click the **Not able to find your address?** button.
- iv. Enter the new address details. **Postcode** is mandatory.

Using Thirty Hour Entitlement in the Citizen Portal

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.



Welcome to the Thirty Hour Entitlement Portal

The Department for Education(DFE) provides an Eligibility Checking System(ECS) to allow you to check online and in real time the validity of eligibility codes issued by HMRC to working parents eligible for 30 Hours Free Childcare. The link to FID is [FID Demo Site](#)

Children whose age is covered by Thirty Hours Entitlement

In the Correct age group

Sophie
Date Of Birth: 09-Mar-2014
Current Age: 3

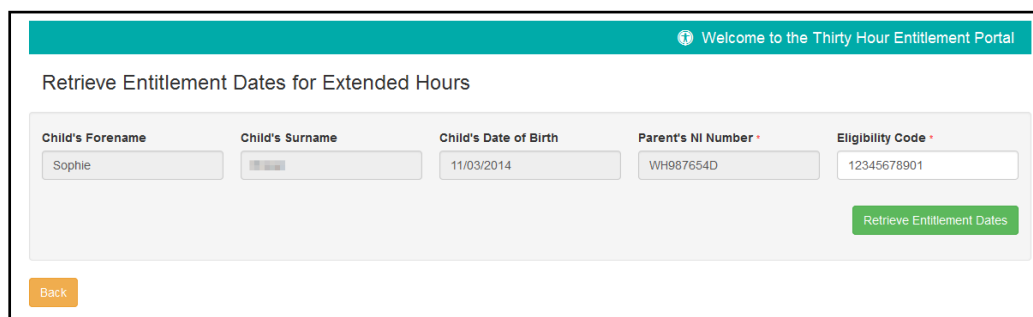
You can perform the following actions

- [Retrieve Entitlement Details](#)

Back Add Child

NOTE: The tile for the newly added child only displays the **Retrieve Entitlement Details** link.

1. To retrieve eligibility details, click the **Retrieve Entitlement Details** button to display the **Retrieve Dates for Extended Hours** page.



Welcome to the Thirty Hour Entitlement Portal

Retrieve Entitlement Dates for Extended Hours

Child's Forename	Child's Surname	Child's Date of Birth	Parent's NI Number *	Eligibility Code *
Sophie		11/03/2014	WH987654D	12345678901

Back Retrieve Entitlement Dates

2. Enter **Parent's NI Number** and **Eligibility Code**.
3. Click the **Retrieve Entitlement Dates** button to perform a check with the DWP and display the check results.

📌 Welcome to the Thirty Hour Entitlement Portal

Retrieve Entitlement Dates for Extended Hours

Child's Forename	Child's Surname	Child's Date of Birth	Parent's NI Number *	Eligibility Code *
<input type="text" value="Sophie"/>	<input type="text" value=""/>	<input type="text" value="11/03/2014"/>	<input type="text" value="WH987654D"/>	<input type="text" value="12345678901"/>

Success !

The earliest start date you can take up Extended Hours funding is 01-Jan-2018 Spring.

Please choose the Provider(s) you would like to check for a Childcare Place, entitlement Details will be shared with the chosen Providers.

✓ This eligibility code is valid from 11-Sep-2017 to 31-Mar-2018, with a grace period to 30-Apr-2018.

You must re-confirm your eligibility code with HMRC between 03-Mar-2018 and 31-Mar-2018 in order to retain the extended hours eligibility, failure to do this could lead to loss of funding.

You can use this link to the [HMRC Childcare Account](#) when you need to reconfirm your Eligibility.

Sharing Entitlement Details with Providers

After retrieving entitlement details, parents and carers can choose to share the detailed results with selected providers. To apply for a placement, click the **Choose Providers to share Entitlement Details** button to display the provider selector page.

The Provider Share screen now includes new filters and additional field which allows for more information to be displayed.

Site logo

Citizen Portal

Home My Account Sign Out English/Cymraeg

📌 Welcome to the Thirty Hour Entitlement Portal

Using this screen will allow you to search for and see which providers offer funded extended hours (30 hours). All providers will be shown but only those offering funding for extended hours can be selected.

You can narrow down the list of providers by ticking to filter based on one or a combination of, the provider name, the type of provider (e.g. childminders) and from a postcode. When you tick to filter by postcode, the postcode shown will be your own postcode but you can change this if required. A distance from box will also be shown this will default to 5 miles initially but can be changed. This allows you to see providers that are 5 miles from that postcode. Once you have entered in the criteria you want to search on please click the Search button.

Once you have found the provider you wish to share your entitlement details with please click the Share button. You can share your details with more than one provider.

Please be aware that by sharing your details with the provider doesn't guarantee you a place, the provider will make contact to establish if they are able to accommodate your requirements and agree the next steps.

Provider Name / Service Name
 Service Type
 From Postcode

<< Previous 1 2 3 4 5 > 112 Next >>

Provider Name ^	Service Name ↕	Service Type	From Postcode	Distance(Miles) ↕	Ofsted Rating	Availability	Share
...		NA		Half Term	<input type="button" value="Share"/>
...		NA			<input type="button" value="Share"/>

Note: the block of text shown on screen can be removed 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.

The new functionality in using this screen will allow you to search for and see which providers offer funded extended hours (30 hours). All providers will be shown but only those offering funding for extended hours can be selected.

Using Thirty Hour Entitlement in the Citizen Portal

You can narrow down the list of providers by ticking to filter based on one or a combination of, the provider name, the type of provider (e.g. childminders) and from a postcode. When you tick to filter by postcode, the postcode shown will be your own postcode, but you can change this if required. A **Distance (Miles)** from Postcode box will also be shown, this will default to 5 miles initially but can be changed. This allows you to see providers that are 5 miles from that postcode. Once you have entered in the criteria you want to search on please click the Search button.

Once you have found the provider you wish to share your entitlement details with then click on the Share button. You can share your details with more than one provider.

Please be aware that by sharing your details with the provider doesn't guarantee you a place, the provider will make contact to establish if they are able to accommodate your requirements and agree the next steps.

NOTE: To be available for selection, a provider must have at least one service with the **Offers Extended Childcare** check box selected in the v4 Client.

The Providers that are currently chosen by the parent/carer to share entitlement details are displayed at the bottom of the screen.

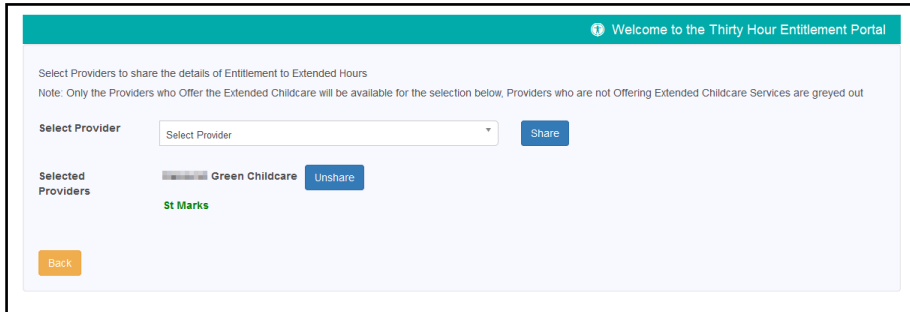
1. To share entitlement details with a new provider:
 - a. Select and enter the relevant information in the fields of your choice. Click the **Search** button.
 - b. Select the required provider. Only providers that offer extended childcare can be selected

The screenshot shows the Citizen Portal interface for searching providers. At the top, there's a navigation bar with 'Home', 'My Account', 'Sign Out', and 'English/Cymraeg'. Below that, a teal banner says 'Welcome to the Thirty Hour Entitlement Portal'. The main content area contains instructions and a search form. The search form has three filters: 'Provider Name / Service Name' (checkbox), 'Service Type' (checked, dropdown menu showing 'Regional Nurture'), and 'From Postcode' (checkbox). A 'Search' button is to the right. Below the search form, there are two status indicators: '1 Providers Found' and '1 Services Found'. A table displays the search results with the following columns: Provider Name, Service Name, Service Type, From Postcode, Distance (Miles), Ofsted Rating, Availability, and Share. The table has one row with a 'Share' button. Below the table, there's a 'Selected Providers' section with three providers listed and 'Unshare' buttons for each. A 'Back' button is at the bottom left.

2. If required, click the **Unshare** button to stop sharing details with this provider.

NOTE: If the provider name is highlighted in green, the child is already attending or is going to attend this provider and the parent or carer cannot unshare the extended entitlement details.

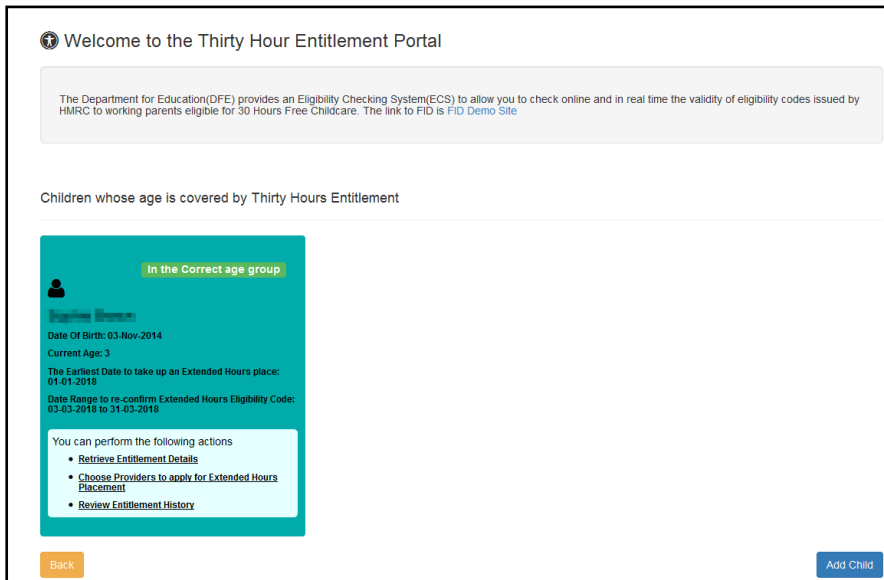
If a provider name is highlighted in red, the provider has rejected a placement application for this child. The parent or carer can unshare the details with them.



Reviewing Entitlement History

Parents and carers can view a history of extended entitlement dates for their child.

1. Click the **30 Hour Entitlement** tile to display the **Welcome** page.




2. Click the **Review Entitlement History** link to display the **Entitlement History** page.

Using Thirty Hour Entitlement in the Citizen Portal

Welcome to the Thirty Hour Entitlement Portal

Entitlement History

Use this screen to review entitlement history for this child.

 Sophie [REDACTED]
Date Of Birth: 03-Nov-2014
Current Age: 3

These details are shared with the following providers: [REDACTED] Green Childcare, [REDACTED] Provider - [REDACTED]

Filter using any keyword

Entitlement Details last retrieved On	Earliest Date to take up 30 Hrs place	Eligible From	Eligible To	Grace Period End	Extended Entitlement Status	Parent's NI Number	Eligibility Code
20/Feb/2018	01/Jan/2018 Spring	11/Sep/2017	31/Mar/2018	30/Apr/2018	Eligible	WH987654D	12345678901
20/Feb/2018	01/Jan/2018 Spring	11/Sep/2017	31/Mar/2018	30/Apr/2018	Eligible	WH987654D	12345678901
20/Feb/2018	01/Jan/2018 Spring	11/Sep/2017	31/Mar/2018	30/Apr/2018	Eligible	WH987654D	12345678901

Back

3. If required, filter the list by entering a keyword.
4. If required, click a column heading to sort the list.

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