



Transport Back Office

Creating and Reviewing Applications

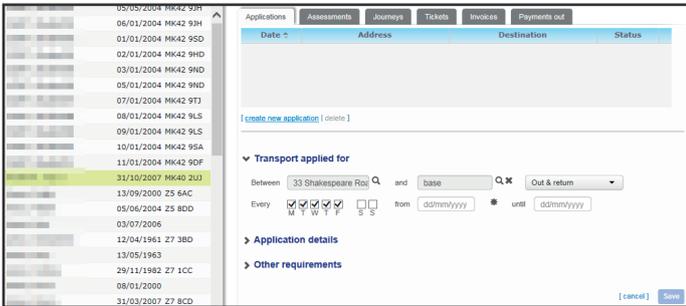
Applications can be created by parents and guardians directly from the Citizen Portal. Once One has matched a Citizen Portal transport application to the correct One Transport passenger, the details of that application show up in that passenger's **Applications** tab. Alternatively, you can use the **Create New Application** function to record a transport application manually.

Once recorded in Transport Back Office, applications can be approved or rejected as required. You can either record your LA's decision on each application individually or use One Transport's bulk routines to approve or reject all applications which meet a particular set of criteria.

Recording an Application

Process

1. Select a passenger and ensure that the **Processes | Single passenger | Applications** tab is selected.
2. Click the **create new application** hyperlink to display editable fields relating to applications.



3. Click the **Between** browse and select the requested start address from the **Choose an address** dialog.
4. Click the **and** browse and select the requested destination from the **Choose a base** dialog.
5. If required, select a journey type from the **Out & return** dropdown menu.
6. If required, use the **Every** check boxes to select the days of the week that the student requires transport.
7. Enter the requested start and end dates into the **from** and **until** fields.
8. Enter **Date of application, Origin of application, Applicant name, Relationship claimed, Phone, Email** and **Address** details into the **Application details** section as required.

Application details

Date of application: Memo +

Origin of application:

Applicant name:

Relationship claimed: with parental responsibility

Phone:

Email:

Address:

9. If required, expand the **Other requirements** section and select from the **Low Income Family status claimed, Disbursement requested** and **Special transport needs claimed** check boxes.

Other requirements

Low Income Family status claimed

Disbursement requested

Special transport needs claimed

[cancel] [Save]

10. Click the **Save** button to finish recording the application.

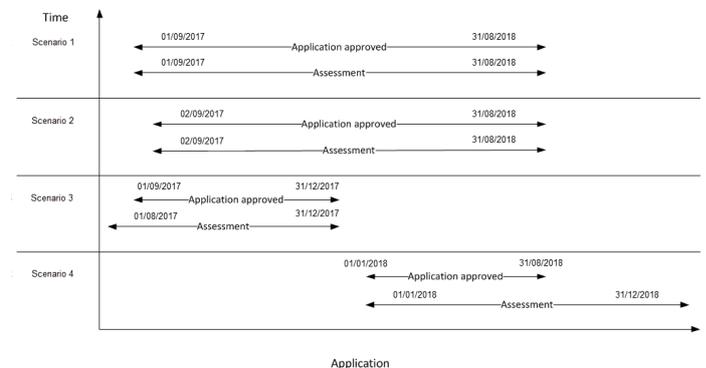
Overlapping Application and Assessment Dates

One Transport provides controls to help you deal with applications and assessments whose dates overlap.

When you save a new application for the first time, a new approval status record with a value of **Pending** is created. One Transport then checks for existing assessments that have overlapping dates and the same passenger, address and destination details. If any such assessments are found, One Transport displays a dialog with the option to approve the newly-created application immediately.

In this scenario, the application is approved for the period in which it overlaps with the assessment. For example, assume that the application runs from 01/09/2017 - 31/08/2018:

- **Scenario 1:** The assessment runs from 01/09/2017 - 31/08/2018. In this case, the entire application is approved, as both assessment and application have the same date range
- **Scenario 2:** The assessment runs from 02/09/2017 - 31/08/2018. In this case, the application is approved from 02/09/2017 - 31/08/2018, as this is the date range that overlaps with the assessment.
- **Scenario 3:** The assessment runs from 01/08/2017 - 31/12/2017. In this case, the application is approved from 01/09/2017 - 31/12/2017, as it does not begin until 01/09/2017.
- **Scenario 4:** The assessment runs from 01/01/2018 - 31/12/2018. In this case, the application is approved from 01/01/2018 - 31/08/2018.



The option to approve is only offered when:

- The application is created for the first time.
- There is a single current or future assessment – either eligible or issued – for the same passenger and with the same destination and address details as the newly-created application, whose details overlap either fully or partially with that application.
- The user has permission to approve applications.



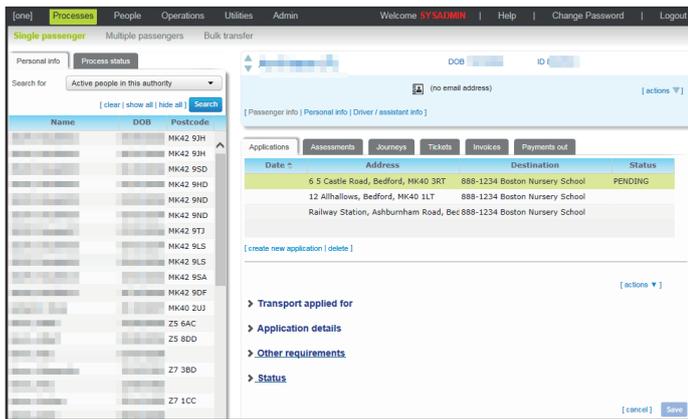
Transport Back Office

Creating and Reviewing Applications

Approving and Rejecting Applications

Individual Applications

1. Select a passenger and ensure that the **Processes | Single passenger | Applications** tab is selected. A list of that passenger's applications is displayed.



2. Highlight the application you want to approve or reject. Editable fields related to that application are displayed.
3. Open the **Status** section and select either **APP-APPROVED** or **REJ-REJECTED** from the drop-down menu.



4. Enter a **from** date. This is the date that the status change will take effect.
5. If required, enter an end date into the **until** field and a comment into the **because** field.

NOTE: From and until dates do not need to correspond to the dates requested on the application. You can approve or reject a sub-period of the application by entering different dates to those requested.

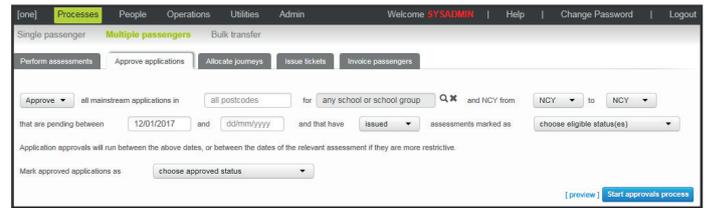
6. Click the **Mark** button to change the application's status and then click the **Save** button to save your changes.

NOTE: Changing the status of an application may cause a message to be sent to the applicant in the Citizen Portal, in line with the LA's messaging settings. For further information on working with portal messages, see the *Configuring Application Status Notifications* section of the *Citizen Portal* handbook, available from www.onepublications.com and My Account.

In Bulk

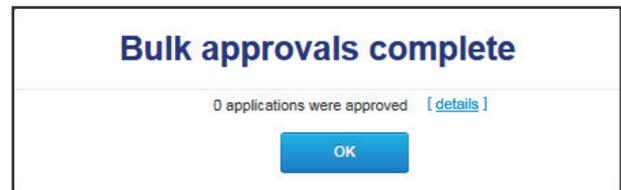
The **Processes | Multiple passengers | Approve applications** page enables you to approve or reject all applications that meet a particular set of criteria. All selection fields except **choose eligible status(es)** are optional.

1. Select **Processes | Multiple passengers | Approve applications** to display editable fields relating to application approval.



2. Choose whether you want to **Approve** or **Reject** applications by selecting the appropriate option from the drop-down menu.
3. Enter the **Postcode** you want to process applications for.
4. Select a school to process applications for by clicking the **any school or school group** browse and selecting from the **Choose a base** dialog.
5. Select the range of NCYs you want to process applications for.
6. Enter valid dates into the **pending between** fields.
7. Select an assessment type from the **issued** drop-down menu.
8. Select an assessment status from the **choose eligible status(es)** drop-down menu (mandatory).
9. Select the status you want to mark the selected applications with from the **Mark approved applications as** drop-down menu (mandatory).
10. Click the **Start approvals process** button to process the applications.

Once the routine has finished, a dialog stating how many applications were approved or rejected is displayed.



More Information:

- *Transport Back Office* handbook, available from www.onepublications.com and My Account.