



School Place Administration

last updated for the Spring 2020 (3.71) release

Handbook

CAPITA

Doc Ref

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01 | Document Change Control

Date	Release	Description
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. See <i>Editing Resource Descriptions</i> on page 29.</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:</p> <p>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
<p>August 2019</p>	<p>3.69.007</p>	<p>Changes have been made to the Find Address functionality throughout the One Citizen Portal for this hotfix:</p> <p>When registering for a Citizen Portal account, a link is available to the Post Office Postcode Finder website to help you with your address.</p> <p>A <u>full</u> postcode must be used to search for an address.</p> <p>Only addresses matching the <u>full</u> postcode are displayed in the search results.</p> <p>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.</p> <p>You <u>must</u> use the Search button and <u>not</u> the Enter key to search for an address.</p> <p>There is no limit to the number of addresses that are displayed in the search results list.</p> <p>See <i>Creating an Account</i> on page 44</p> <p>See <i>Contact Details</i> on page 51</p> <p>See <i>Adding a Child</i> on page 57</p> <p>For School Places Administration, the Find Address functionality has also been changed (as above) in the following areas:</p> <p>You can add a child (and address) from the School Places page, without having to navigate back to the main My Family page.</p> <p>If the child is Moving Home</p> <p>If the child is a member of a Service or Crown Servant Family</p> <p>If the child has a Sibling at the school</p> <p>See <i>Adding a Child</i> on page 57</p> <p>See <i>Making a School Places Application</i> on page 58</p>
<p>Summer 2019</p>	<p>3.69</p>	<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.</p> <p>An address can now be found using the Street name.</p>

Date	Release	Description
		<p>If an address is changed, a validation message is displayed on any of the Contact Details pages.</p> <p>The 'white-space' has been trimmed on all form submissions, e.g "Ian" and "Ian ". This will prevent conflicts when matching data.</p>
Apr 2019	3.68	<p>Welsh Language Fields</p> <p>For Welsh users, Languages fields are now populated with Null values instead of NOT/NKN, where values are not asked from the applicant when adding a child.</p> <p>See Adding a Child on page 78.</p> <p>Update to Data Protection Consent Statement</p> <p>If an LA updates it's Data Protection Consent Statement, an additional dialog is displayed when logging on to the Citizen Portal.</p> <p>For more information, see _d2h_bmk_Ref4947094_78 on page Error! Bookmark not defined..</p>
Nov 2018	3.67	<p>Responding to Offers</p> <p>The options available to citizens when reviewing offers in Citizen Portal have been updated, so that only those options which are relevant to the status of the preference are displayed</p> <p>See Responding to Offers on page 74.</p> <p>Appeals</p> <p>When parents are responding to offers, they can now indicate that they are requesting an appeal and provide basic details about the type of appeal they are lodging.</p> <p>See Responding to Offers on page 74.</p>

02 | Citizen Self Service Admin

Overview

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

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

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

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

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

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

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

More Information:

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

Using this Handbook

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

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

At the end of this handbook, there is a section explaining how the parent, carer or guardian makes an application. For more information, see [Introduction to Making Applications](#) on page 43.

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.

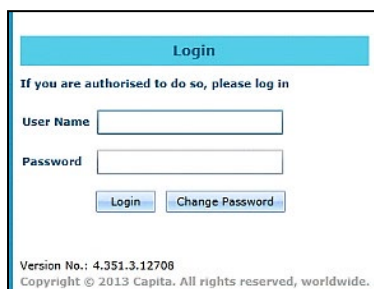
More Information:

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

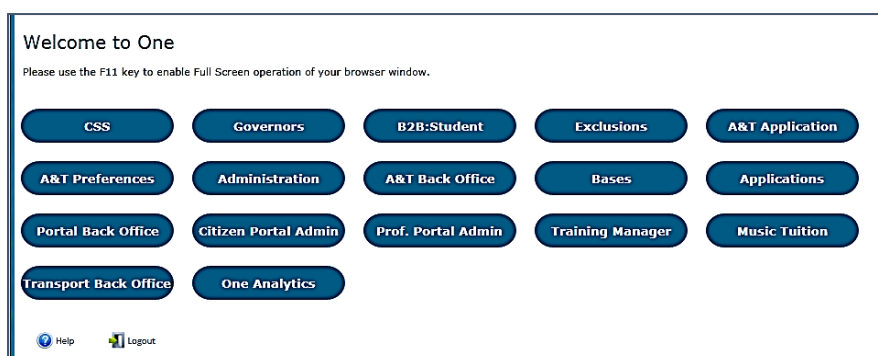
To log in to One v4 Online, you need to obtain a licence key for the required v4 Online module from Capita. You must also be set up as a user in One v4 Client.

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



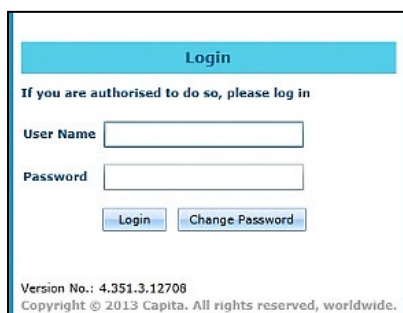
The **Welcome to One** page displays the options that are available to you, subject to a licence being held by your Local Authority and your personal or group permissions.

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:

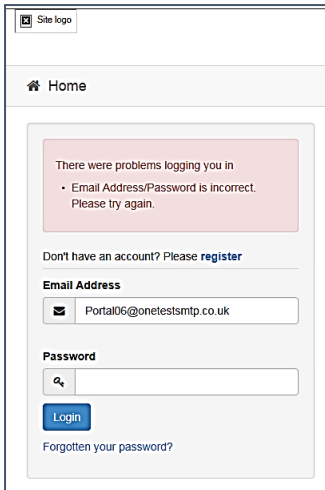
RG_Online_Administration_Login_Logout available from the [One Publications](#) website.

Forgotten Password

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

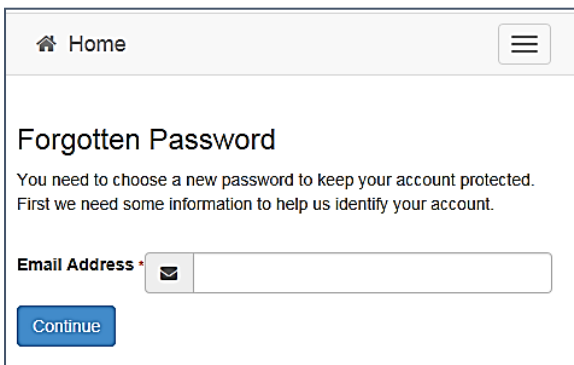
Check that you have entered the correct email address.

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



To reset a password:

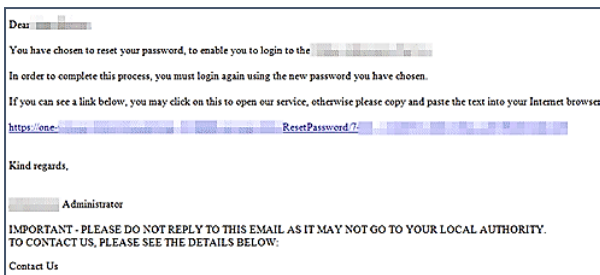
1. Click the **Forgotten your password?** link to display the **Forgotten Password** dialog.



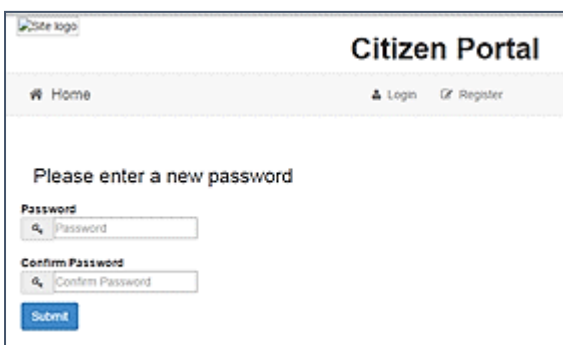
2. Enter your email address, then click the **Continue** button.

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

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



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



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

Managing Users

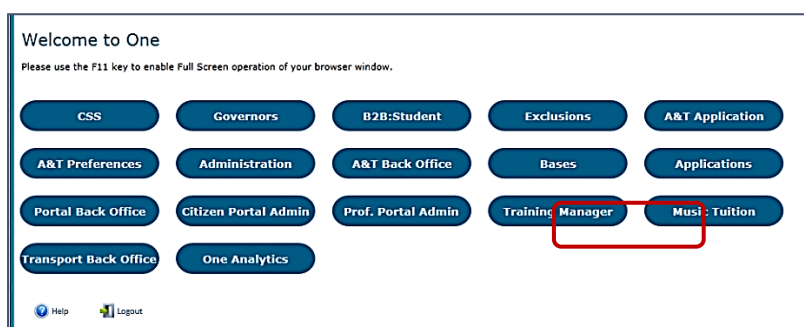
5. Enter your new password again in the **Confirm Password** field.
6. Click the **Submit** button. A message confirms that you have successfully changed your password.
7. Click the **Login** button to log in to the Citizen Portal with your new password.

Logging in to Citizen Portal Admin

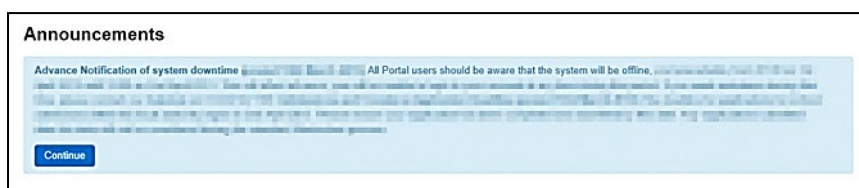
The **Citizen Portal Admin** functionality is available in One v4 Online. To use the Citizen Portal Admin you must have an email address, be set up as a user and belong to a user group in One v4. Your System Administrator will have set up the Citizen One Portal licence key and your permissions via **v4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

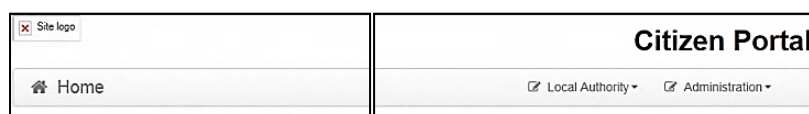
The Citizen Portal Home Page

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

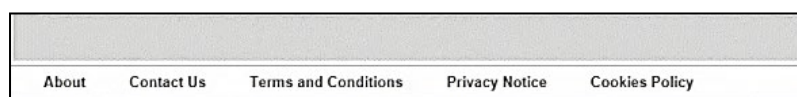
- **Administration** – for more information, see the [Home | Administration Page](#) section on page 11.
- **GDPR Administration** – for more information, see the [Home | GDPR Administration Page](#) section on page 12.
- **Local Authority** – for more information, see the [Home | Local Authority Page](#) section on page 12.

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

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



The Citizen Portal footer displays the following links:



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

Home | Administration Page

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

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

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

Home | GDPR Administration Page

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

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

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

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

Home | Local Authority Page

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

From here the administrator can manage applications and users.

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

- School Place Administration Handbook – the section on *Introduction to School Places Applications*.

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
...	✓	View Details	Change Email Address Reset Password
...	✓	View Details	Change Email Address Reset Password
...	✓	View Details	Change Email Address Reset Password
...	✓	View Details	Change Email Address Reset Password
...	✓	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

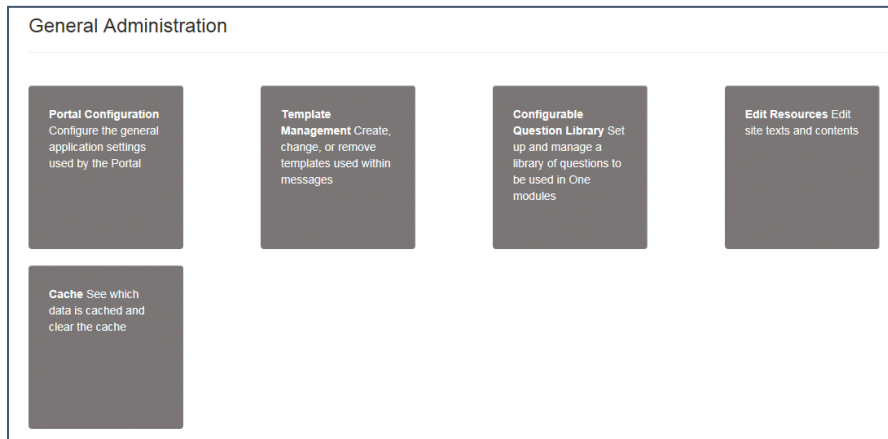
To reset a user's password:

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

Introduction to General Administration

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



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

- **Portal Configuration** – configure the general application settings used by the portal. For more information, see the following sections:
 - [Portal Configuration](#) on page 16.
 - [Configuring the Site Settings](#) on page 16.
 - [Configuring Password Settings](#) on page 16.
 - [Configuring ECS Settings](#) on page 17.
 - [Configuring Application Settings](#) on page 18.
 - [Configuring Message Settings](#) on page 20.
 - [Configuring Application Type Settings](#) on page 21.
 - [Configuring Scheduled Task Settings](#) on page 21.
- **Template Management** – create, change or remove templates used within the messages. For more information, see the following sections:
 - [Template Management](#) on page 22.
 - [Creating a Template](#) on page 22.
 - [Viewing Templates](#) on page 24.
 - [Editing a Template](#) on page 24.
 - [Deleting a Template](#) on page 25.
- **Configurable Question Library** – set up and manage a library of questions to be used in the One A&T module. For more information, see the following sections:
 - [Configurable Question Library](#) on page 26.

General Administration

- [Adding a New Check Box Question to a Library](#) on page 27.
- **Edit Resources** – edit site texts and contents. For more information, see the following sections:
 - [Edit Resources](#) on page 28.
 - [Editing Resource Descriptions](#) on page 29.
- **Cache** – see which data is cached and clear the cache. For more information, see the following section:

[Cache](#) on page 31.

Portal Configuration

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

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

More Information:

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

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

Configuring the Site Settings

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

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

Configuring Password Settings

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

To configure the password security settings:

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

Password Settings

Configure Security Settings

Minimum password length: 8

Maximum password length: 15

Minimum digits in password: 2

Minimum number of lower case characters: 1

Minimum number of upper case characters: 1

Forgotten password check period: 15

Forgotten password attempts: 3

Locked account forgotten password check period: 180

3. Click the **Save** button.

Configuring ECS Settings

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

To configure the ECS settings:

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

ECS Settings

Configure the link to the DWP Eligibility Checking Service

ECS Mock Eligibility Status: Eligible

ECS Mock Error Status: Success

ECS Environment: Mock

ECS Local Authority: [Field]

ECS Username: [Field]

ECS Password: [Field] **Update ECS Password**

ECS System Status: [Field] **Test**

ECS Override Settings

These 'override' settings will normally be empty. They should only be set after guidance from Capita.

ECS Service URI Override: [Field]

ECS Service Version Override: [Field]

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.

General Administration

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).

Configuring Application Settings

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

To configure the application settings:

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

Application Settings

Configure Application Settings

Admissions Online URL

Free School Meals application prefix

Free School Meals dummy base id

Transport application prefix

Transport dummy base id

Permitted Titles

Permitted Relationships

School Place application Permitted Faiths

Two Year Old Funding Application Prefix

Two Year Old Funding Placement Prefix

2 Year Old Funding Dummy Base Id

2 Year Old Funding application reference UDF field name

2 Year Old Funding application second applicant UDF field name

The current school base group

Training Manager Schools base group

SEND Dummy Base Id (Shared with Professional Portal)

SEND Form Submission Notification Email Addresses

3. Click the **Save** button.

Configuring Message Settings

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

To configure the message settings:

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

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

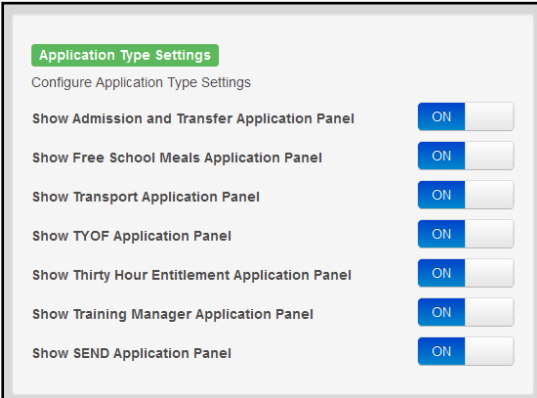
3. Click the **Save** button.

Configuring Application Type Settings

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

To configure the application type settings:

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



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

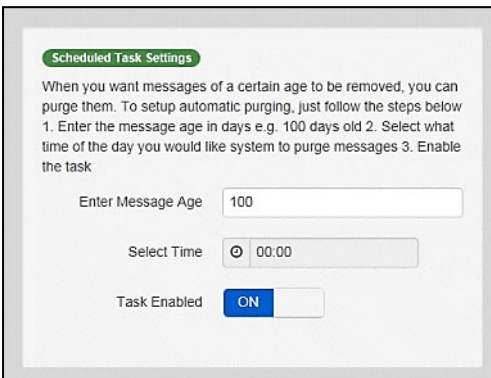
3. Click the **Save** button.

Configuring Scheduled Task Settings

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

To configure the scheduled task settings:

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



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

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

Enter Message Age:

Select Time:

Task Enabled:

3. Click the **Save** button.

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

Template Management

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

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

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

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

Title	Placeholder_Title
Forename	Placeholder_Forename
Surname	Placeholder_Surname
Business Phone	Placeholder_BusPhone
Mobile Phone	Placeholder_Mobile
Home Phone	Placeholder_HomePhone

Creating a Template

To create a new template:

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

Administration

Create Template

Template Name

Subject

Message

How to Format

Preview

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.

Administration

Create Template

Template Name

Subject

Message

How to Format

Header #
 Dear [Title][Surname],
 Italic

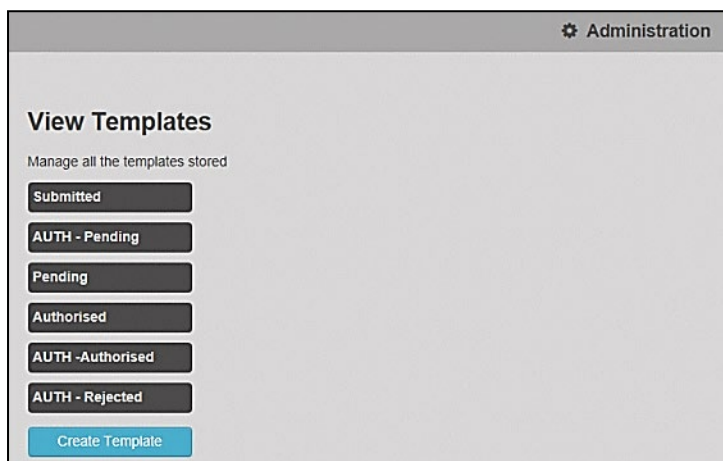
Preview
 Header
 Dear [Title][Surname],
 Italic

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

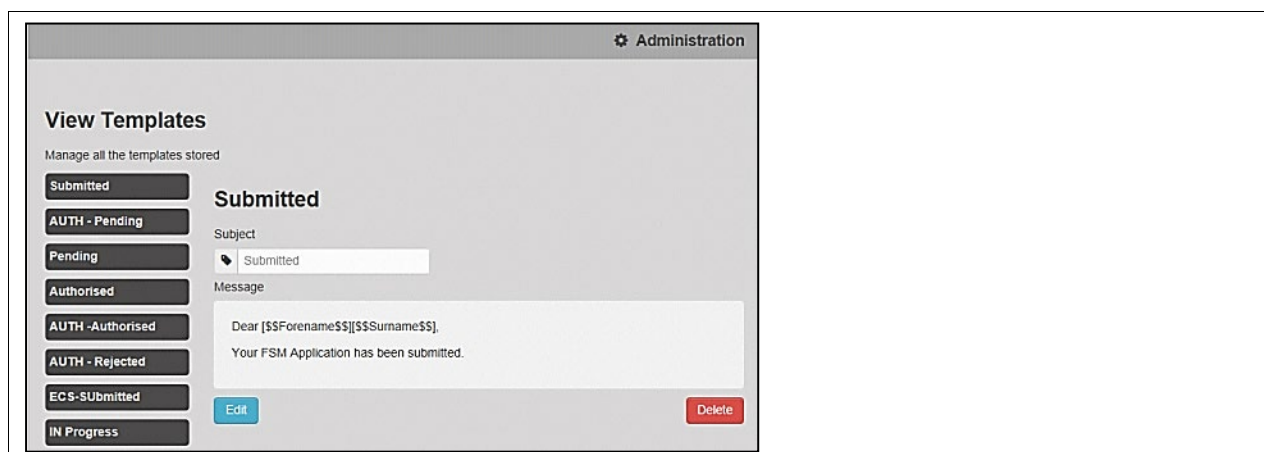
Viewing Templates

To view an existing template:

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



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



Editing a Template

To edit an existing template:

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

Edit Template

Template Name
 Template 1

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

Message
 Add To Body Insert Placeholder

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

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

Cancel Save

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

Deleting a Template

To delete an existing template:

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

Administration

View Templates
 Manage all the templates stored

Submitted

AUTH - Pending

Pending

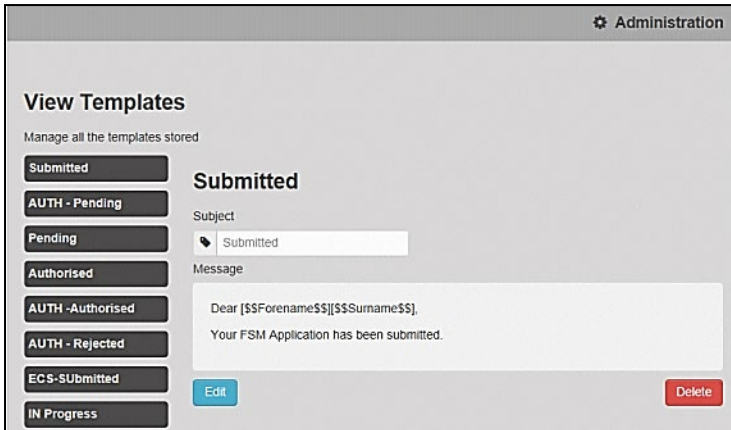
Authorised

AUTH - Authorised

AUTH - Rejected

Create Template

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

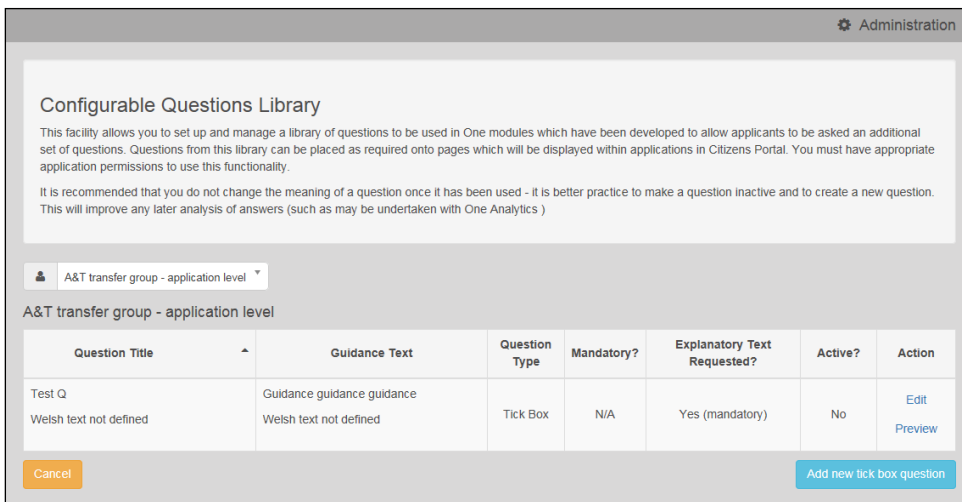


3. Click the **Delete** button to remove the stored template; you must confirm the deletion.

Configurable Question Library

The **Configurable Question Library** page enables you to set up libraries of questions for use in One modules. Using standardised question libraries ensures that questions are presented to applicants in a common way and helps when modelling the answers to the questions in One Analytics.

The page is accessed via **Citizen Portal Admin | Administration | General Administration | Configurable Question Library**.



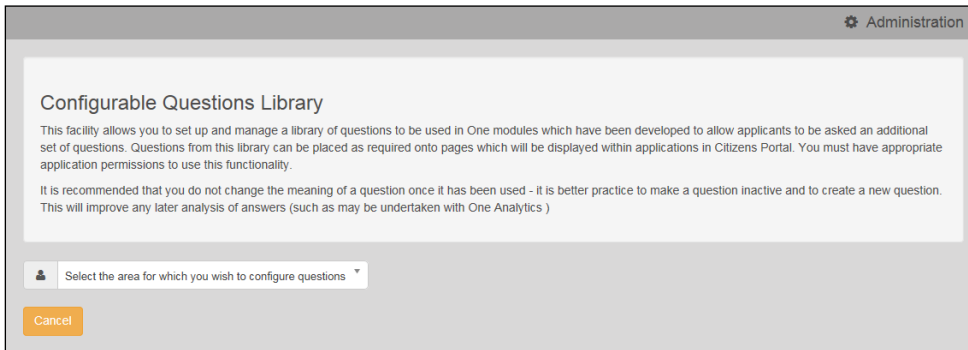
After selecting the page, you are prompted to select the area that you want to edit questions for. Once you have selected an area you can perform the following tasks:

- **Add a new tick box question** to the area's library.
- **Preview** a question to see how it would appear to a Citizen Portal user.

Edit existing questions.

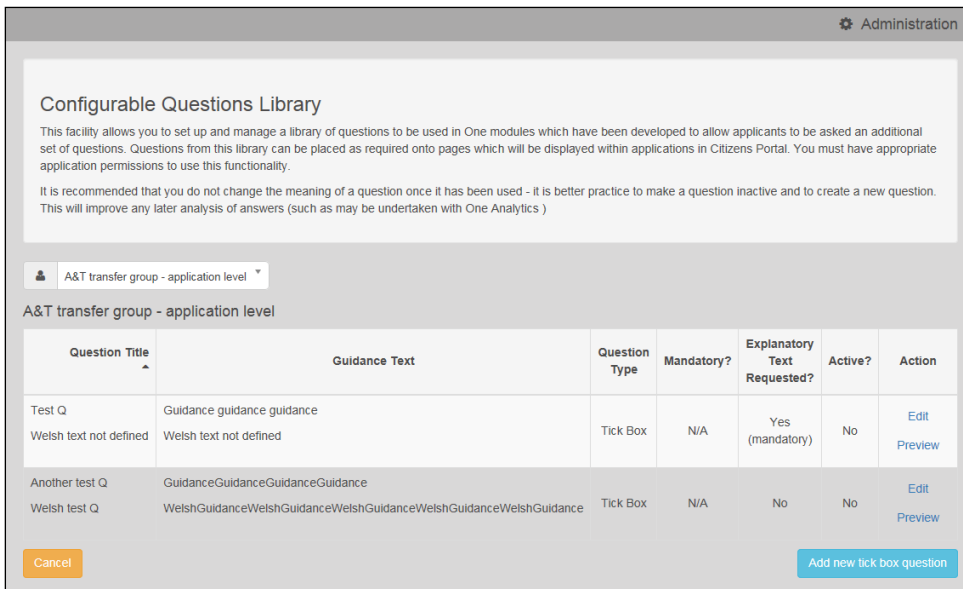
Adding a New Check Box Question to a Library

1. Select **Citizen Portal Admin | Administration | General Administration | Configurable Question Library** to display the **Configurable Question Library** page.



2. Select the area for which you want to configure questions from the drop-down menu. The drop-down menu only displays those areas that you have the required permissions to edit.

A list of existing questions for the selected area is displayed.



3. Click the **Add new tick box question** button to display the **Tick Box Question Editor** dialog.

Tick Box Question Editor

	English	Welsh
Question Title:	<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>
Guidance Text:	<div style="border: 1px solid #ccc; height: 40px;"></div>	<div style="border: 1px solid #ccc; height: 40px;"></div>
Action when tick box is ticked:	<input type="radio"/> Do not ask for explanatory text <input type="radio"/> Ask for explanatory text(and make it mandatory) <input type="radio"/> Ask for explanatory text(and make it optional) <input type="radio"/> Allow this to be specified on individual forms	
Make this question active:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

NOTE: The **Tick Box Question Editor** dialog is also displayed when you select an existing question's **Edit** option.

4. Enter an English **Question Title**, **Guidance Text**, or both. At least one of these fields must be completed for each question.
5. If applicable, enter a Welsh **Question Title**, **Guidance Text**, or both.
6. Select an option from the **Action when tick box is ticked** menu.
7. If you want to make the question active immediately, ensure that the **Make this question active** slider is set to **Yes**. Otherwise, set it to **No**.
8. If required, click the **Preview** button to display the **Question Preview** dialog. This dialog shows how your question will look to applicants. Click the **Close** button to close the dialog and return to the question editor dialog.

Question Preview

Test

Please provide details *

9. Click the **Save** button to close the dialog and add the new question to the list.

Edit Resources

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

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

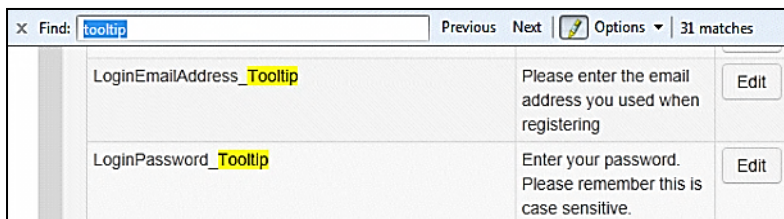
Text Resources

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

Markdown

- Text Blocks

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



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

Editing Resource Descriptions

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

To edit the resource descriptions:

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

General Administration

Name	Value	
AccountManagement_PageTitle	My Account	Edit

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

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

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

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

Resource Type: Account

Resource Key: AccountManagement_PageTitle

Resource Culture: en

Resource Value: This is the only editable field.

Buttons: 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)

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

Site Logo and Header text

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

To edit the resource descriptions:

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

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

Name	Value	
CitizenPortal_HeaderText	Citizen Portal	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.

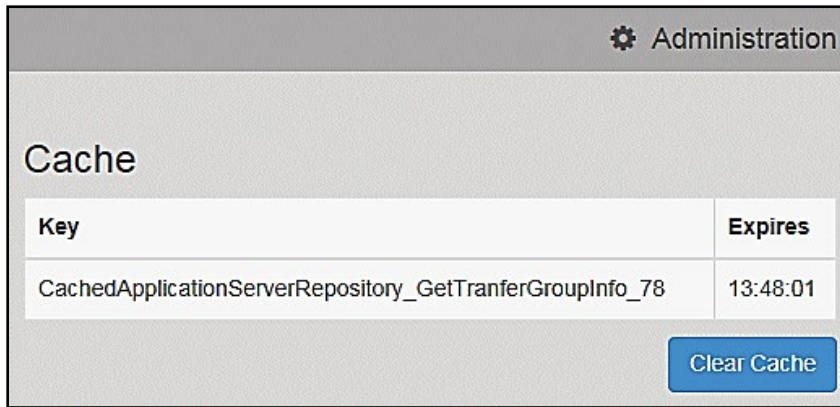
Cache

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.



The screenshot shows a web interface for 'Administration' with a 'Cache' section. It contains a table with two columns: 'Key' and 'Expires'. The table has one row with the key 'CachedApplicationServerRepository_GetTranferGroupInfo_78' and the expiration time '13:48:01'. A blue 'Clear Cache' button is located at the bottom right of the table area.

Key	Expires
CachedApplicationServerRepository_GetTranferGroupInfo_78	13:48:01

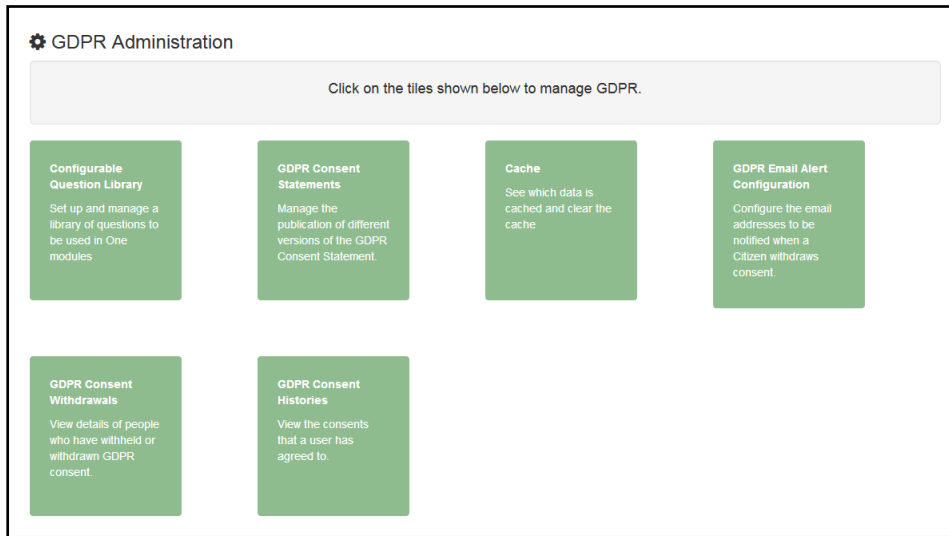
Clear Cache

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

05 | GDPR Administration

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

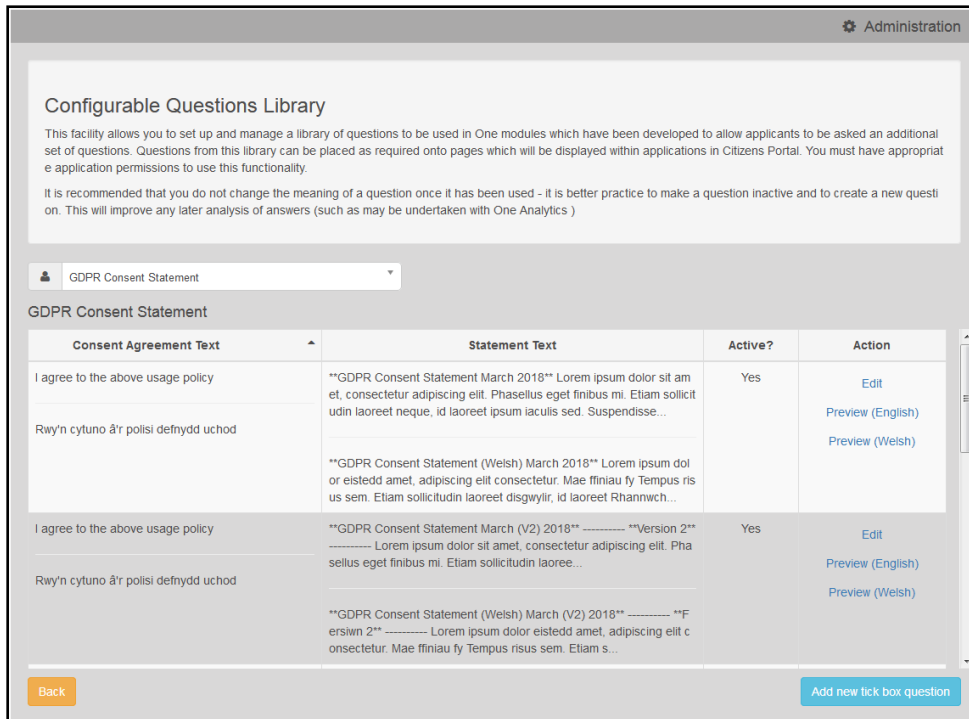
Name	Read	Read-Write	Read-Write-Delete	Deny
▶ Citizen Portal		✓		
Administration		✓		
Free School Meals		✓		
GDPR Administration		✓		
PortalAdmin Access	✓			
Thirty Hour Entitlement User		✓		
Transport		✓		
User Management		✓		

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.

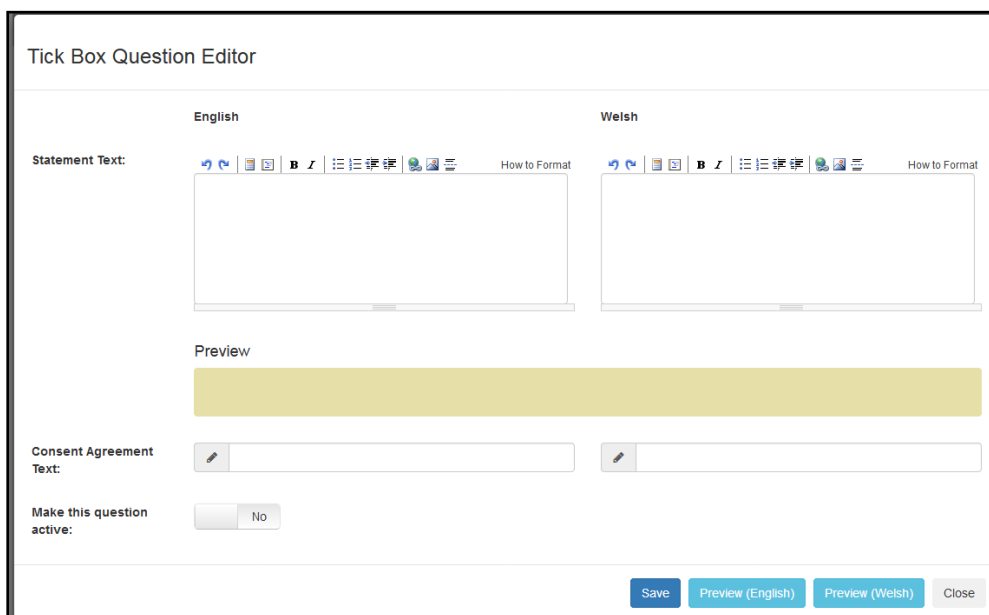
The page is accessed via **GDPR Administration | Configurable Question Library**.



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.

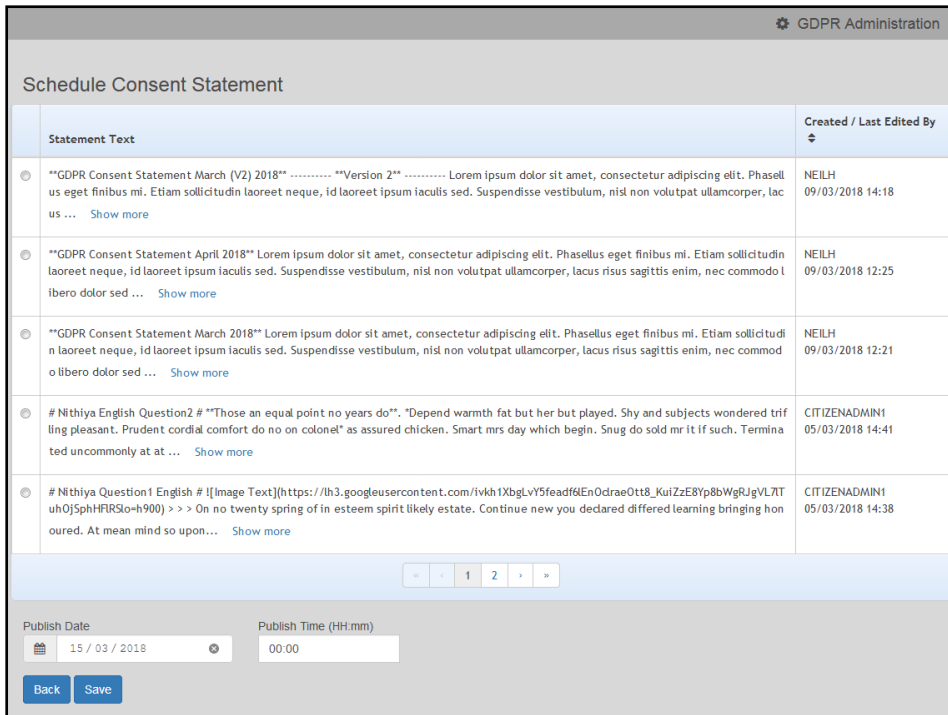
1. Select **GDPR Administration | GDPR Consent Statements** to display the **GDPR Consent Statement Schedule** page.

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	

1 2 3

[Add New](#)

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

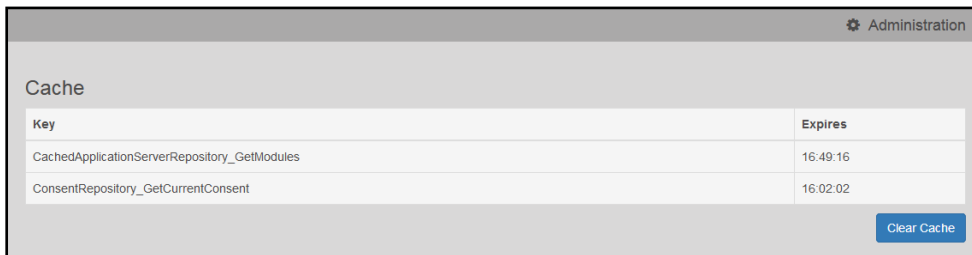


3. Select the radio button adjacent to the required statement and click the **Save** button.

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, Greystriars, 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, Greystriars, 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.

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

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.

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

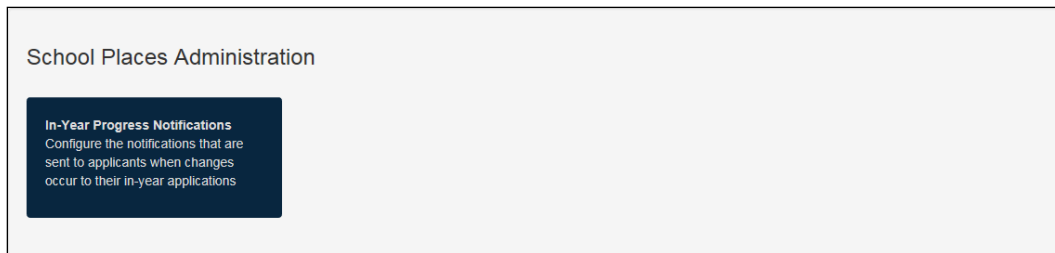
GDPR Consent Statement	Action	Action On	Consent Version	Consent Published Date
GDPR Consent Statement March (V2) 2018 Version 2 Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus eget finibus mi. Etiam sollicitudin laoreet neque, id laoreet ipsum iaculis sed. Suspendisse vestibulum, nisl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

06 | School Places Administration

Introduction to School Places Administration

The **In-Year Process Notifications** page enables you to specify which message templates are sent to applicants when their in-year applications are imported into A&T Back Office, or the status of their in-year application changes.

It is accessed via the **School Places Administration** panel, part of the main Citizen Portal **Administration** page.



Configuring In-Year Progress Notifications

1. Configure the message templates that you want to use when in-year applications are imported and updated.

For information on configuring message templates, see *Template Management* on page 16.

2. Select **One v4 Online | Citizen Portal Admin | Home | Administration | In-Year Progress Notifications** to display the **In-Year Transfer Progress Notifications** page.

 A screenshot of the 'In-Year Transfer Progress Notifications' configuration page. At the top right, there is a gear icon and the word 'Administration'. The main heading is 'In-Year Transfer Progress Notifications'. Below this is a light gray box with the text: 'Configure the notifications sent to applicants when their application is updated', 'Enter the name of the template which relates to the particular status change', and 'If no template is selected, no progress updates will be sent for that application change'. There are two dropdown menus: 'Application imported' with the selected value 'A&T In-year transfer application imported', and 'Status Update generated' with the selected value 'A&T In-year status update'. At the bottom left is an orange 'Cancel' button, and at the bottom right is a blue 'Save' button.

3. Use the **Application imported** drop-down menu to select the message template that you want sent to in-year applicants when their applications are imported.
4. Use the **Status Update generated** drop-down menu to select the message template that you want sent to in-year applicants when the status of their application is changed.
5. Click the **Save** button to save your changes.

07 | Applications

Introduction to School Place Applications

The One Citizen Self Service portal provides full support for school place applications, integrating with the One Admissions and Transfers (A&T) Back Office module. Existing A&T Online customers can take advantage of the Self Service portal.

Applications for school places are made via the Citizen Self Service portal, but are reviewed in v4 Online via **A&T Back Office | E-Application Enquiries**. The applications are then imported into the One Admissions & Transfers module.

NOTE: For more information on using Admissions Online, refer to the online help file.

For more information on how parents, carers and guardians make their applications in the One Citizen Self Service Portal, see the *Introduction to Making Applications* section in the *Making Applications* chapter.

School Places Applications

When a school place application is made via the Citizen Self Service portal, any children that have either not been successfully matched to a student in One, or that have been matched with conflicts, (i.e. there are differences between some details of the incoming child and the matched student) are processed in v4 Online via **A&T Back Office | Process | Incoming Students**.

NOTE: For more information on matching students, see the *Matching Students via One Portal Back Office Handbook*, available from the [One Publications](#) website.

08 | Making Applications

Introduction to Making Applications

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

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

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

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

Information about the parent, carer or guardian and their family is also accessed from the **Home** page. For more information, see [My Family](#) on page 56.

The parent, carer or guardian will receive messages are from the local authority regarding the status of their application. For more information, see [Messages](#) on page 80.

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

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

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

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

More Information:

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

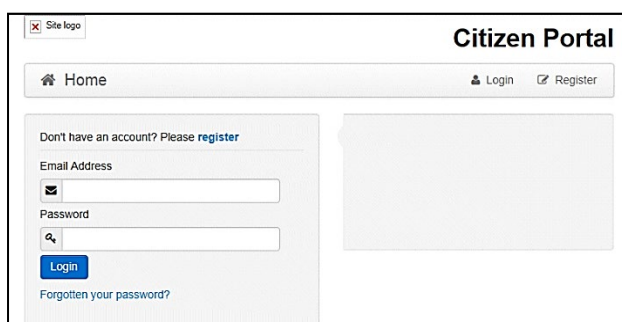
Creating an Account

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

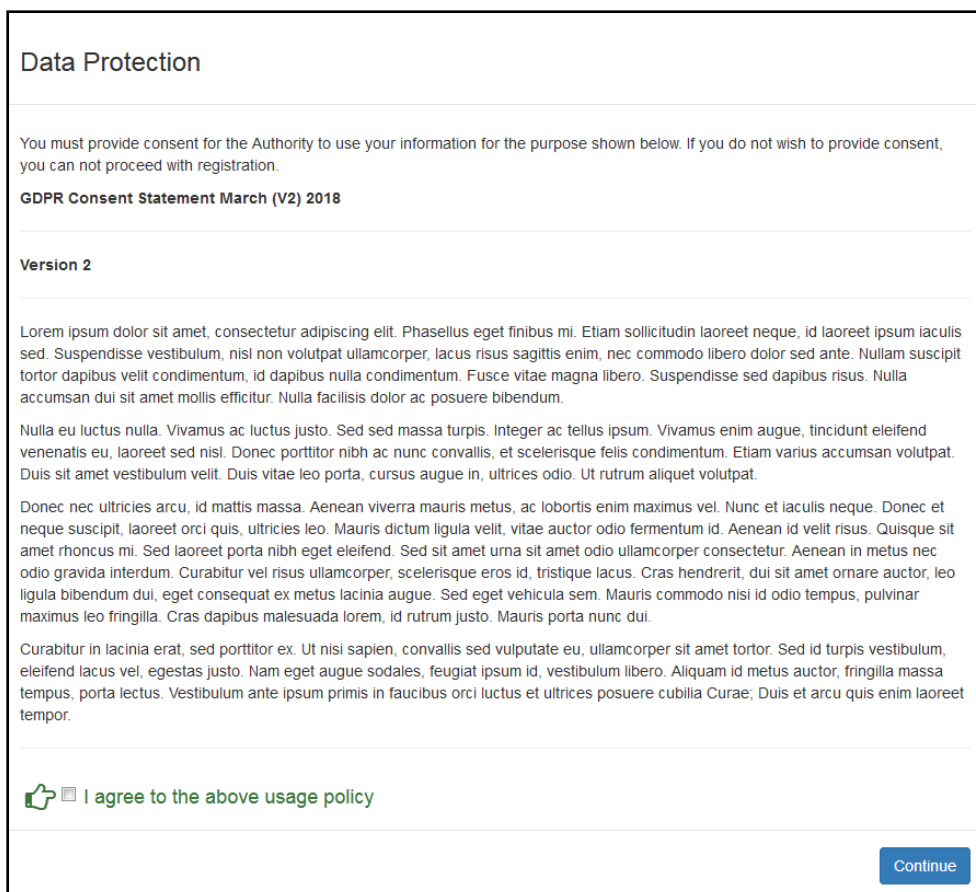
When they register, they will be asked to agree to the GDPR Consent Statement.

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

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



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



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

Registration

You need to first register with us before you can book a place for your child. Please read the terms and conditions before you 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.
 - 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		<input type="text" value="100"/>
House Name		<input type="text"/>
Building Name		<input type="text"/>
Street Name		<input type="text" value="100 Street"/>
District / Village		<input type="text"/>
Town		<input type="text" value="100"/>
County		<input type="text"/>
Postcode *		<input type="text" value="100 100"/>
Country		<input type="text" value="Please select"/>

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

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

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

Home Phone

Mobile Number

Work Phone

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

Logging in to the Citizen Portal

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

- 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.

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

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

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

- Click the **Continue** button to display the **Home** page.
- If the LA has updated its **Data Protection Consent Statement**, a **Data Protection** dialog is displayed. For more information, see [Update Data Protection Consent Statement](#) on page 47.

- i. On the **Data Protection** dialog, select the checkbox to agree to the confirmation.
- ii. Click the **Continue** button. A confirmation message displays to conform your consent

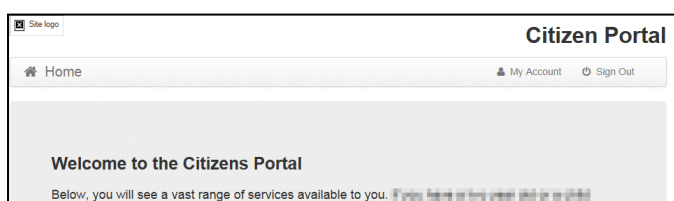
Important Note: It is now possible to enable a second verification step to increase your security. For more information, see [Two Step Verification](#) on page 48.

Update Data Protection Consent Statement

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

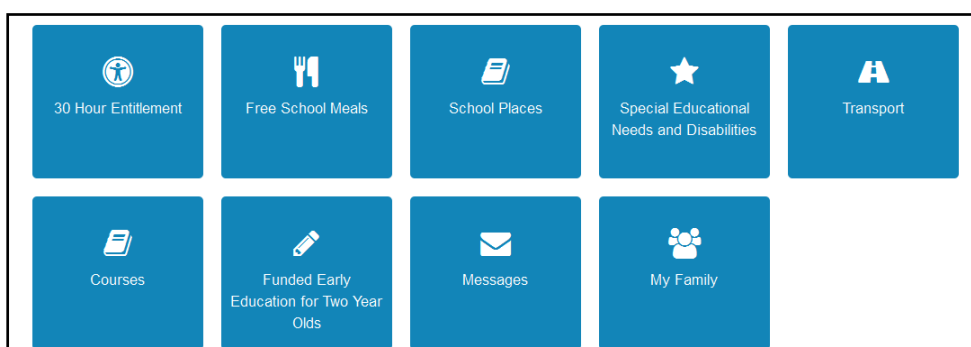
If you do not wish to give consent to the updated Consent Statement, your account will be disabled and the Authority will invoke its Withdrawal of Consent procedures.

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 50.

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.

Two Step Verification

Enabling Two Step Verification

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

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

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

To set up two step verification:

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



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

Two Step Verification

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

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

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

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

Preferred method

Email

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

Verification Code sent

Your Verification Code has been sent.

Please enter your Verification Code to continue.

Your Verification Code *

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

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

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

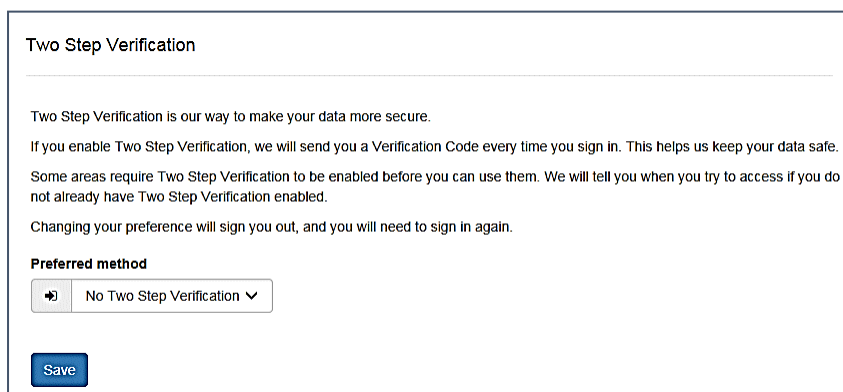
Disabling Two Step Verification

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

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

To disable two step verification in a different module:

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



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

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

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**.

- Enter information into the fields displayed in the following graphic. Click in a field to display the relevant tooltip.

Personal Details

Title

Forename

Surname

Gender

- 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:

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

Contact Details

Address

Home Phone

Mobile Number

Work Phone

- To edit your address, click **Use Another Address** to display the **Find Address** dialog.
- Enter your full postcode and click the **Search** button to display a list of addresses for your postcode.

Making Applications

The screenshot shows the 'Contact Details' form. At the top, there is a 'Find Address' section with a search input field containing 'mk42 9jp'. Below the input is a list of search results: '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', and '102, Tracy Avenue, Kempston, Bedfordshire, MK42 9JP'. Below the list is a button that says 'Not able to find your address?' and a blue 'Search' button. Below the search section are three phone number fields: 'Home Phone' (01234567891), 'Mobile Number' (07796232333), and '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.

The screenshot shows the 'Contact Details' form with the 'Use Another Address' button highlighted in blue. Below the button are several address fields: 'House Number' (1), 'House Name', 'Building Name', 'Street Name', 'District / Village', 'Town', 'County', 'Postcode', 'Country' (Please select), 'Home Phone', 'Mobile Number', and 'Work Phone'. A blue 'Save' button is located at the bottom left of the form.

6. Click the **Save** button

Change Email Address

To change your email address:

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

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

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

Change Email Address

New Email Address *

✉

Confirm New Email *

✉

Password *

🔑

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

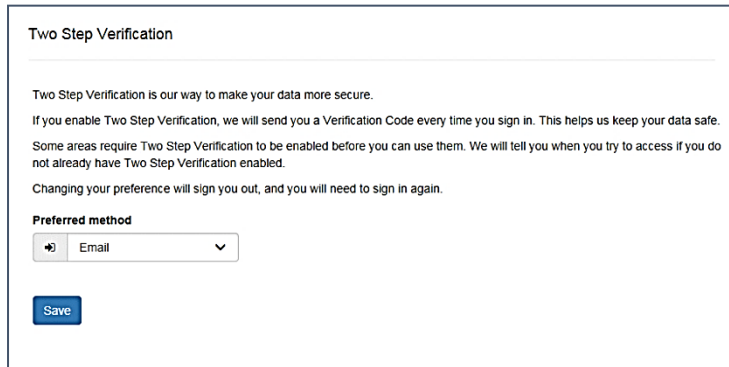
Two step verification is an additional process to increase your security when logging onto the Citizen Portal.

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

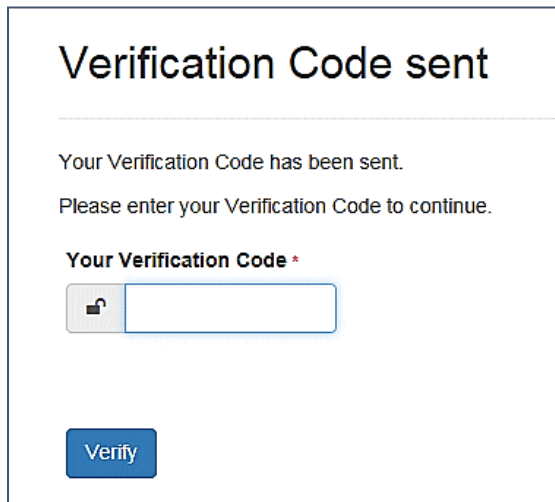
Two Step Verification is our way to make your data more secure.
If you enable Two Step Verification, we will send you a Verification Code every time you sign in. This helps us keep your data safe.
Some areas require Two Step Verification to be enabled before you can use them. We will tell you when you 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.

Two Step Verification

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

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

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

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

Preferred method

☞ No Two Step Verification ▾

Save

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.

Consent History

Your agreement(s) for the Local Authority to use your information in compliance with current data protection regulations.

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

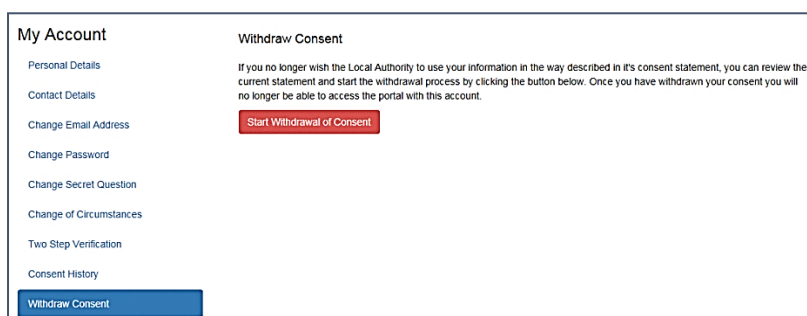
This is a read-only page.

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.

Making Applications

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



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

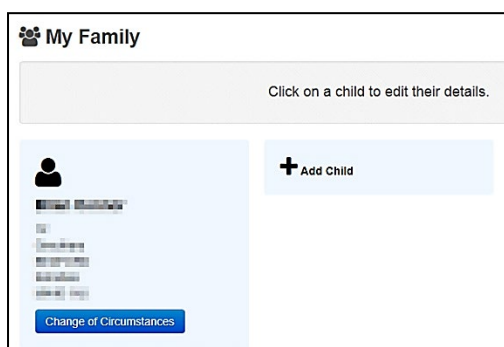
You have previously agreed to the authority's most recent Data Protection Consent Statement.
If you wish to withdraw your consent, click the withdraw button below.
6. Click the **Withdraw my consent** button to display the **Decline** dialog.

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

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

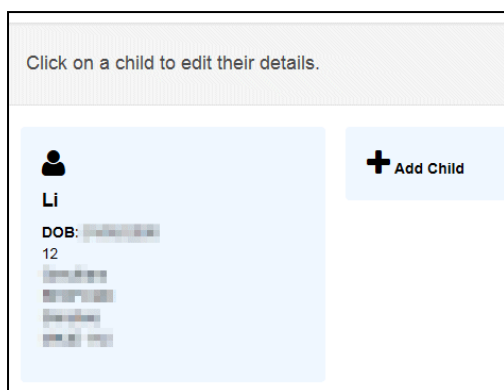
My Family

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



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

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



Click on a child to view or edit their details

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

More Information:

For more information, refer to [Adding a Child](#) on page 57.

Adding a Child

To add a child to a parent's account:

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

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

Making Applications

Contact Details

Find Address

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

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

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

House Number

House Name

Building Name

Street Name

District / Village

Town

County

Postcode *

Country

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.

Applications (School Places)

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

All of the screens in this application flow can be edited by the local authority. For more information on editing the School Places application flow, see the *Customising Citizen Portal School Place Applications* document, available from the [One Publications](#) website.

Making a School Places Application

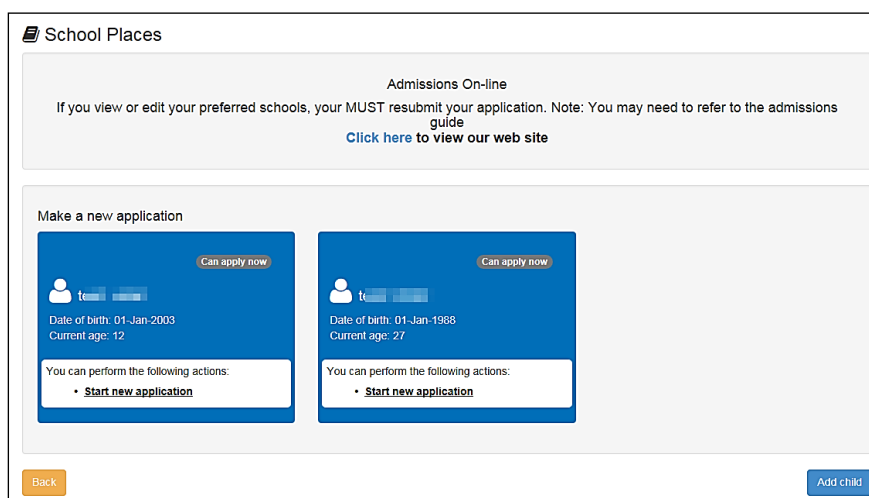
The One Citizen Self Service portal provides full support for applications for school places, integrating with the One Admissions and Transfers (A&T) Back Office module.

You only make one online application per Normal Phased transfer group. However, you can make multiple In Year applications within one academic year, if required.

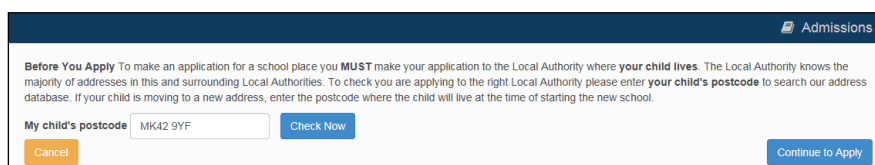
NOTE: As the pages are configurable by the local authority, the graphics below are examples only.

To make a new application for a school place:

1. Select **Citizen Portal | Home | School Places** to display the **School Places** page.

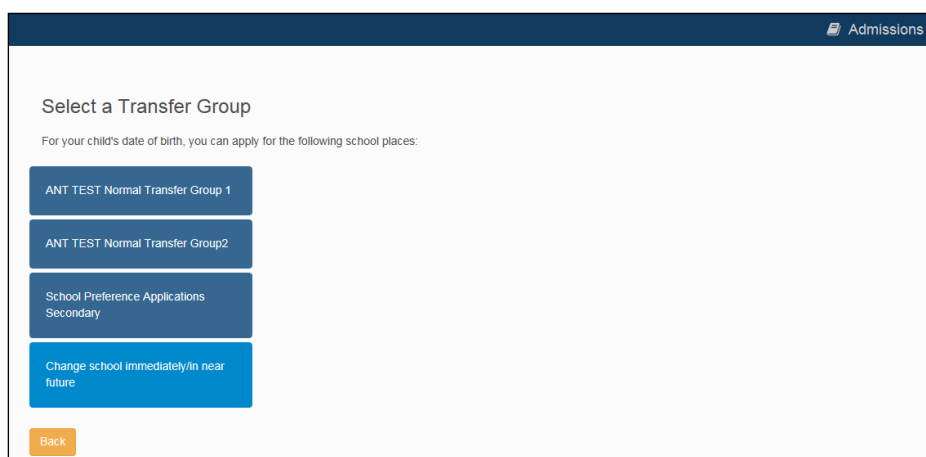


2. Click a child's **Start new application** hyperlink to begin a new application for that child. The **Before You Apply** page is displayed.



NOTE: If you cannot see the child you wish to apply for in the list, you can add them using the **Add Child** function. For more information on adding a child from the **School Places** page, see [Adding a Child](#) on page 78.

3. Enter your child's postcode and then click the **Check Now** button. One checks the postcode to ensure that it is within the LA's catchment area. If it is not, an error message is displayed.
4. Click the **Continue to Apply** button to display the **Select a Transfer Group** page.



5. Select the school place you wish to apply for. The next screen to be displayed varies depending on the option that you selected:
 - If you selected **Change school immediately/in near future**, the **In Year Transfer** page is displayed:

Making Applications

In year Transfer

Please tell us your reason for wanting to change school?

Please select

Please tell us the date you would like your child to start at the new school?

Confirm

Back

Next

- i. Select a reason from the reason for wanting to change school field.
 - ii. Enter the date that you would like your child to start at the new school and then click the **Confirm** button. One checks to see which school year the child would be eligible for at the new school.
 - iii. Click the **Next** button to display the **Find Child** screen.
- If you selected an option other than **Change school immediately/in near future**, the **Find Child** screen is displayed.

Find Child

ANT TEST Normal Transfer Group 1

You may have received a letter from your Local Authority, containing a UID (Unique Identifier) for your child. This is a code which identifies your child's application and using it will make it faster to complete your application.

The UID will look something like this: 82011H5HJ4QQ96A8

Please note the UID is specific to your child for this year's applications. If you have more than one child that you need to make an application for this year you may have received a separate UID for each child.

You are applying for a school place for the following child: T [redacted]

Unique Identifier [input field]

Date of Birth [input field] 14-October-2003

Having problems finding or using the UID? Continue making your application by clicking here

No UID

Back

Next

6. Enter your child's **Unique Identifier** and **Date of Birth** and then click the **Next** button to display the **Additional Child's Details** screen.

Additional Child's Details

Does your child have a Statement of Special Educational Needs?

Is your child registered as being in the care of a Local Authority e.g. are they fostered or a 'Looked After' child?

Select Care Authority

Is your child a twin or triplet, etc. (one of a multiple birth)?

Back

Next

NOTE: The UID helps One to match your child's details, but it is not required. If you do not know your child's UID, click the **No UID** button to proceed to the **Additional Child's Details** screen without entering these details.

7. Fill out the fields on the **Additional Child's Details** page:
 - a. Select the required check boxes to answer the questions in the **Additional Child's Details** section.
 - b. Click the **Next** button to display the **Address Details** page.

Address Details

You have previously indicated that your current address is [redacted]. If this is not your current address, please update this via My Family. Then please navigate back to School Places and select to 'Continue this application'. It is very important that we know the correct current address for you.

Moving Home?

If you are moving to the above address please supply date.

Moving Date

Enter your new postcode and use our Find Address (if your address is not listed please try to enter address manually) and type the correct address details (where possible) if possible? (see information panel on the left for more details)

Find Address

8. The **Address Details** page enables you to record optional information around house moves:

- If the child is moving from their current address before starting at their new school, enter a **Moving Date**.
- To update the **Address** details:
 - i. Enter a full postcode in the **Find Address Postcode** field.

Find Address

ii. Click the **Search** button to display a list of addresses with that postcode.

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

iii. Select the correct address from the list. Alternatively, click the **Not able to find your address?** button and enter the child's address details manually.

- If the child is a member of a **Service** or **Crown Servant** family, select the check box and click **Next** to display the **Returning Service Families Only** dialog.
 - i. If the family are returning/moving to take up duties, enter a **Moving Date**.

11. The layout of the **Child's Current School** page changes depending on whether One already has a current school on record for the child. The following image shows what the screen looks like when One has a school on record.

- If One has the correct school on record, click the **Next** button to display the **Preference School Search** page.
- If you wish to change the school that One has on record, click the **Change Current School** button to remove that school from the application, then do the following to select a new school.
- If One does not have a school on record (either because you clicked the **Change Current School** button or because there was never a school held in the database):
 - i. Enter search criteria into the fields in the **Find a School** section and then click the **Search** button to display a list of schools that match those criteria.

Making Applications

Find a School

To find the school you are looking for, search using a postcode, local authority, school name or a combination of these, then click Search.

Postcode: Schools located in: School Name (Tip: Part names give better results):

11 School(s) found << Previous 1 2 Next >>

School Name	Gender	Address	Website
Bedford Academy	CoEd	Mile Road, , Bedford, Bedfordshire, MK42 9TR	
Bedford College	CoEd	Cauldwell Street, , Bedford, Bedfordshire, MK42 9AH	
Bedford Drive Primary School	CoEd	Bedford Drive, Rock Ferry, , Birkenhead, Merseyside, CH42 6RT	
Bedford Free School	CoEd	Cauldwell Street, , Bedford, Bedfordshire, MK42 9AD	
Bedford Hall Methodist Primary School	CoEd	Breaston Avenue, , Leigh, Lancashire, WN7 3DJ	
Bedford High School	CoEd	Manchester Road, , Leigh, Lancashire, WN7 2LU	
Bedford Primary School	CoEd	Quarry Road, , Bootle, Merseyside, L20 9LJ	
Bedford Road Lower School	CoEd	Hillgrounds Road, Kempston, , Bedford, Bedfordshire, MK42 8QH	
Central Bedfordshire College	CoEd	Kingsway, , Dunstable, Bedfordshire, LU5 4HG	
Central Bedfordshire UTC	CoEd	Parkside Drive, Kingsland Skills Centre, , Houghton Regis, Bedfordshire, LU5 5PY	

- ii. Click on a school to select it.
- iii. Click the **Next** button to display the **Preference School Search** page.

Admissions

Preference School Search

To search for a school press the search button.
[Click here to view our web site for details about admissions criteria](#)

Find a School

To find the school you are looking for, search using a postcode, local authority, school name or a combination of these, then click Search.

Postcode: Schools located in: School Name (Tip: Part names give better results):

NOTE: If you cannot find the child's current school in the search you can enter the name of the school manually into the **Currently educated at field**.

12. Select a preference school:
 - a. Enter search criteria into the fields in the **Find a School** section and then click the **Search** button to display a list of schools that match those criteria.

Find a School

To find the school you are looking for, search using a postcode, local authority, school name or a combination of these, then click Search.

Postcode: Schools located in: School Name (Tip: Part names give better results):

11 School(s) found << Previous 1 2 Next >>

School Name	Gender	Address	Website
Bedford Academy	CoEd	Mile Road, , Bedford, Bedfordshire, MK42 9TR	
Bedford College	CoEd	Cauldwell Street, , Bedford, Bedfordshire, MK42 9AH	
Bedford Drive Primary School	CoEd	Bedford Drive, Rock Ferry, , Birkenhead, Merseyside, CH42 6RT	
Bedford Free School	CoEd	Cauldwell Street, , Bedford, Bedfordshire, MK42 9AD	
Bedford Hall Methodist Primary School	CoEd	Breaston Avenue, , Leigh, Lancashire, WN7 3DJ	
Bedford High School	CoEd	Manchester Road, , Leigh, Lancashire, WN7 2LU	
Bedford Primary School	CoEd	Quarry Road, , Bootle, Merseyside, L20 9LJ	
Bedford Road Lower School	CoEd	Hillgrounds Road, Kempston, , Bedford, Bedfordshire, MK42 8QH	
Central Bedfordshire College	CoEd	Kingsway, , Dunstable, Bedfordshire, LU5 4HG	
Central Bedfordshire UTC	CoEd	Parkside Drive, Kingsland Skills Centre, , Houghton Regis, Bedfordshire, LU5 5PY	

- b. Click on a school to select it. **The Preference Reasons: Sibling** page is displayed.

13. Enter sibling details for the child:

- If the child will have a sibling attending the selected school or a partner school at their start date:
 - i. Select the check box, then click **Next** to display the **Sibling Details** screen.

- ii. Enter the mandatory sibling's **Personal Details**.
- To update the **Address** details:
 - i. Click the **Use Another Address** button.
 - ii. Enter a full postcode in the **Find Address Postcode** field.

- iii. Click the **Search** button to display a list of addresses with that postcode.

- iv. Select the correct address from the list. Alternatively, click the **Not able to find your address?** button and enter the child's address details manually.
- v. click the **Next** button to display the **Sibling's School** page.

Making Applications

- vi. If the sibling attends a partner school rather than the preference school, click the **Find School** button and use the search fields to select the relevant school.

School Name	Gender	Address	Website
Bedford Academy	CoEd	Mile Road, , Bedford, Bedfordshire, MK42 9TR	
Bedford College	CoEd	Cauldwell Street, , Bedford, Bedfordshire, MK42 9AH	
Bedford Drive Primary School	CoEd	Bedford Drive, Rock Ferry, , Birkenhead, Merseyside, CH42 6RT	
Bedford Free School	CoEd	Cauldwell Street, , Bedford, Bedfordshire, MK42 9AD	
Bedford Hall Methodist Primary School	CoEd	Breaston Avenue, , Leigh, Lancashire, WN7 3DJ	
Bedford High School	CoEd	Manchester Road, , Leigh, Lancashire, WN7 2LU	
Bedford Primary School	CoEd	Quarry Road, , Bootle, Merseyside, L20 9LJ	
Bedford Road Lower School	CoEd	Hillgrounds Road, Kempston, , Bedford, Bedfordshire, MK42 8QH	
Central Bedfordshire College	CoEd	Kingsway, , Dunstable, Bedfordshire, LU5 4HG	
Central Bedfordshire UTC	CoEd	Parkside Drive, Kingsland Skills Centre, , Houghton Regis, Bedfordshire, LU5 5PY	

- vii. Click the **Next** button to display the **Preference Reasons** page.

- If the child will not have a sibling attending the selected school or a partner school at their start date, click the **Next** button to display the **Preference Reasons** page.

14. Select the reasons that you wish your child to attend the selected preference school and then click the **Next** button.

At this point in the application flow there are some optional pages that display only if required. After you have completed all relevant pages then the **Other Reasons** page is displayed. Skip to step 13 for information on the **Other Reasons** page

- If you indicated that your child has an aptitude for the preference school’s specialisms on the **Preference Reasons** page then the **Specialisms** page is displayed:

- Use the check boxes to select the relevant specialisms.
 - If you want your child to still be considered for the school if they do not get a place on the basis of their ability or aptitude then select the check box.
 - Click the **Next** button
- If the LA has configured special reasons then the **Special Reasons** screen displays.

Fill out the special reasons questions and click the **Next** button.

- If the LA has configured additional questions at the application level then the **Preference Reasons (Continued)** page is displayed.

For more information on setting up additional questions, see the *Configuring Additional Questions* reference guide, available from the [One Publications](#) website.

Making Applications

Admissions

Preference Reasons(Continued)

SG Amar GT

SG Needs GT

SG Chitra QT

Please provide details

SG Needs QT

SG QT - Shafi SG GT - Shafi

SG Chitra GT

SG GT - Amar SG GT - Amar

Please provide details

sub gp default QT subgp def GT

NTGSG-Amar QT NTGSG-Amar GT

[Back](#) [Next](#)

Select any relevant questions and add explanatory text as required, then click the **Next** button to display the **Other Reasons** page.

Admissions

Other Reasons

You may tell us of any other reasons to support your application. If you have selected **Bedford Free School** for social or medical reasons you should give more details below. You may be contacted to discuss this further.

Other Reasons

There is a limit of 3000 characters for you to express other reasons. 3000 remaining...

[Back](#) [Next](#)

15. Enter any other reasons you may have to support your application into the **Other Reasons** free text field and then click the **Next** button to display the **Your Preferred Schools** page.

Admissions

Your Preferred Schools

You have selected the schools below. You may choose up to 9 schools and you may change your selection until 31/08/2015 15:00

Use the arrows to rank your preferred schools; your most preferred school must be at the top ranked 1.

Rank	School name	Re-order
1	Bedford Free School	Edit Remove

[Add a new preferred school](#)

[Back](#) [Next](#)

16. If you wish to:

- add further preferences, click the **Add a new preferred school** button and then repeat steps 9-12.
- edit the preference reasons given for a particular school, click the **Edit** button.

- delete a preference altogether, click the **Delete** button.

Otherwise, click the **Next** button to display the **Application Summary** page.

Application for [REDACTED], Date of birth: [REDACTED]

You have completed your application and it has been saved. Using the options below, you can now either 'Submit' your application or you can 'Return to Your Application Later' if you don't want to submit it just yet.

Also you can see a printable summary of your application using the 'Preview' button.

Terms and Conditions
 Terms & Conditions
 All parents are advised to read the 'Information for Parents' book that gives details of how applications are processed. The timetable for Coordinated Admissions is contained in the booklet.
 Parents intending to move into the designated area of a school are advised that it is essential to provide evidence e.g. solicitor's letter confirming the exchange of contracts and the date of legal completion or a tenancy agreement longer than 6 months.
 If a place in a preferred school has been obtained on the basis of a false statement of false information, the Council reserves the right to withdraw the place.
 If the permanent address of the child changes after making an application, please let us know as soon as possible in writing.
 Where we are able to offer more than one school, we will offer you your highest ranked preferred school, and withdraw all lower ranked offers. If we are unable to offer you any of your preferred schools, we will endeavour to offer you a place at the nearest available school.
 Parents should note that transport to school is only provided where the walking distance is over 3 miles to the child's designated area school.
 If you are not offered a place at your preferred school you will have the right to an independent appeal.
 The council has no obligation to finding an alternative school for your child if that do not have permanent residence in this authority.
 For further details please refer to the admissions guide or click here to view our web site

Data Protection
 Data protection
 Click here to view our web site

School Place Offer
 The Local Authority will contact you to discuss your application. Please ensure that you have provided the correct contact details.

Preview Your Application
 To see a printer friendly version of your unsubmitted application, click the Preview button
 Preview

Submit Your Application
 Once you 'Submit' your application you will no longer be able to make changes online.
 If you are not ready to submit your application now, you can click 'Return Later' instead and you may return to your application at a later date. You will then have the opportunity to make changes until you submit it. The Local Authority will not process this application until it has been submitted.
 I declare that I have checked the information given in this application and believe it to be correct. I declare that I have read and agree to the terms and conditions set out above.
 Return Later Submit Now

Back

17. Select the declaration check box and then click the **Submit Now** button to submit your application and display a confirmation screen.

Application for T[REDACTED], Date of birth: 14/10/2003

Your application has been successfully submitted. You will shortly receive a confirmation email listing your school preferences. If additional information or evidence, e.g. medical/baptism certificates/supplementary information forms, is required for these schools, you will need to supply them.

To see a printer friendly version of your submitted application, click the Preview button. Preview

You do not need to take any further action. However, if you want to change any of the details you have submitted you may do so until 31/09/2015 15:00. If you make any changes you **MUST RE-SUBMIT** it. Otherwise your application will not be considered.

Alternatively, click the **Return Later** button to save your application for later.

NOTE: To return to a previously-created application, select **Citizen Portal | Home | School Places** and then click the **Continue Application** link under the child's name.

Multiple In-Year Applications

Over the course of a year, a parent can make several different in-year applications. However, LAs can restrict applicants so that only one in-year application per child can be open at any one time, if required.

If the LA has elected to prevent applicants opening more than one concurrent in-year application, then One does not display the **Start new application** link if there is already an opened, unsubmitted application for the child.

Once the in-year application is submitted, One displays the **Start new application** link again as normal. However, if you attempt to make a new application when there is already an opened, submitted application for the child, then One displays a dialog after the **In-Year Transfer** page prompting you to either close or edit the existing application:

Application for change of school

You have previously submitted an application for an in-year change of school for [redacted]. This application was submitted on 05/10/2016.

The latest status regarding the schools for which you expressed a preference is:

School	Status	Notes
Penglais School		

Please tell us whether your application for a change of school for [redacted] is

is finished and you wish to make a completely new application; or

is ongoing and you wish to make changes to it

Please select one of the choices above before continuing

Cancel Continue

- If you select the **make a completely new application** radio button, then One displays the **Close existing application and start new application** dialog when you click the **Continue** button. Select a reason for closure from the drop-down menu and click the **Continue** button to close the existing application and continue with the new application process.

Close existing application and start new application

The previous application will be closed and the Local Authority will be informed that you no longer wish further action to be taken in relation to your earlier application.

Please select a reason for closure

Please select

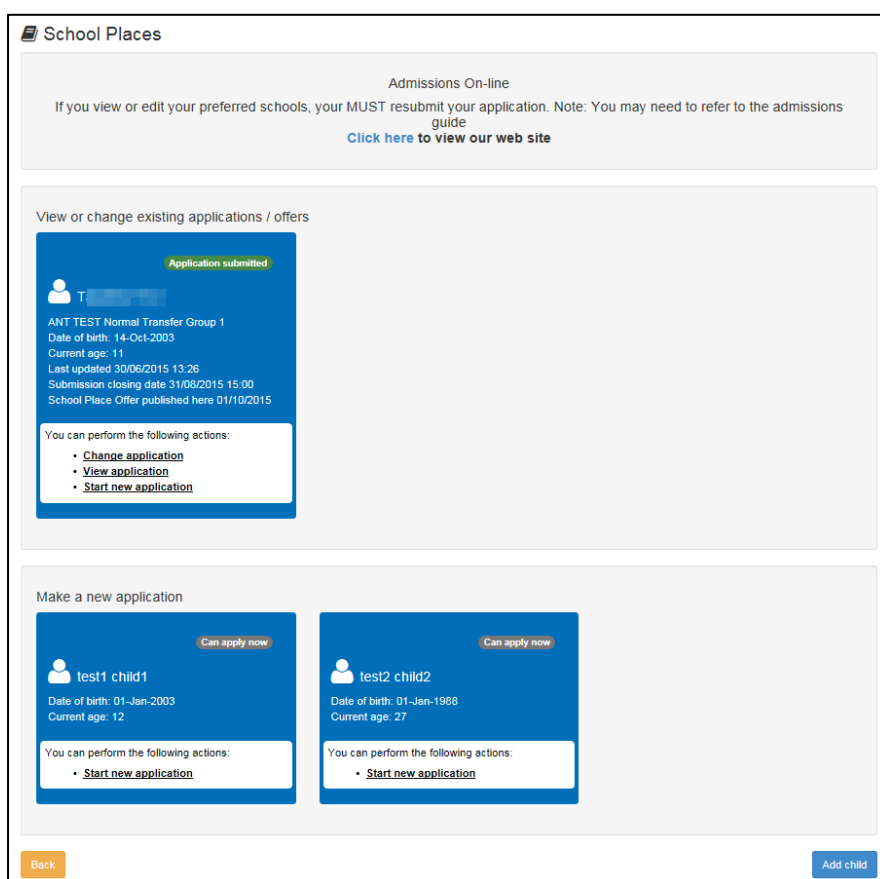
Cancel Continue

- If you select the **make changes** radio button, then One displays the **Change Application** page when you click the **Continue** button. Click the **Continue** button to re-open the application at the **In Year Transfer** page.

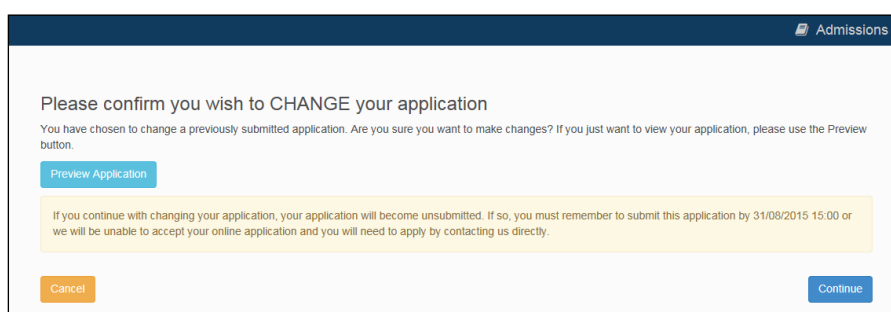
Changing an Application

To change a previously-submitted application:

1. Select **Citizen Portal | Home | School Places** to display the **School Places** page.



2. Click the **Change Application** link under the child's name. A confirmation dialog is displayed.



3. Click the **Continue** button to re-open the application at the **Additional Child's Details** page for Normal Phased applications and the **In Year Transfer** page for In Year applications.

NOTE: At this point the application reverts to an unsubmitted state. You must re-submit the application in order for it to be considered, even if you do not make any changes to it.

4. Proceed through the application flow as described in [Making a School Places Application](#) on page 58.

Closing an Application

The **Close Applications** hyperlink enables you to close in-year applications via the Citizen Portal. This hyperlink is only displayed if the LA has enabled citizens to remove in-year applications.

Normal phased applications can only be removed in A&T Back Office.

1. Select **Citizen Portal | Home | School Places** to display the **School Places** page.

Making Applications

School Places

Admissions On-line

If you view or edit your preferred schools, you **MUST** resubmit your application. Note: You may need to refer to the admissions guide
[Click here](#) to view our web site

View or change existing applications / offers Display closed in-year applications

Application started (not yet submitted)

Date of birth: 14-Jan-2016
In year 2016
Date place wanted: 24-Sep-2016
Reason: Move into LA
Last updated 13/09/2016 16:02
Preference 1: Bishop Parker Catholic School
Submission closing date 31/08/2017 23:00

You can perform the following actions:

- Close application
- Continue application
- Start new application

Application started (not yet submitted)

Date of birth: 01-Jan-2016
In year 2016
Date place wanted: 15-Sep-2016
Reason: Move into LA
Last updated 13/09/2016 16:20
Submission closing date 31/08/2017 23:00

You can perform the following actions:

- Close application
- Continue application
- Start new application

Application submitted

Date of birth: 14-Jan-2016
In year 2016
Date place wanted: 23-Sep-2016
Reason: Move within LA
Last updated 16/09/2016 09:30
Preference 1: Yr Ysgol Gymunedol Gymraeg

You can perform the following actions:

- Close application
- Change application
- View application
- Start new application

- Click the **Close Application** hyperlink on the application you want to close to display the **Close Application** page.

Admissions

Close Application

Warning - No further action will be taken for this application - please confirm

Close reason

Raised in error

Cancel Confirm

- Select a **Close reason** from the drop-down menu and then click the **Confirm** button to close the application.

Display Closed In-Year Applications

The **Display Closed In-Year Applications** button is only displayed if you have previously closed applications. Click this button to display closed applications in the **View or change existing applications / offers** panel.

Closed applications can be viewed, but not changed or resubmitted.

View or change existing applications / offers Display closed in-year applications

Application started (not yet submitted)

Date of birth: 14-Jan-2016

In year 2016
Date place wanted: 24-Sep-2016
Reason: Move into LA
Last updated 13/09/2016 16:02
Preference 1: Bishop Parker Catholic School
-1
Submission closing date 31/08/2017 23:00

You can perform the following actions:

- Close application
- Continue application
- Start new application

Application submitted

Date of birth: 14-Jan-2016

In year 2016
Date place wanted: 23-Sep-2016
Reason: Move within LA
Last updated 10/09/2016 09:30
Preference 1: Yr Ysgol Gymunedol Gymraeg

You can perform the following actions:

- Close application
- Change application
- View application
- Start new application

Make a new application

Can apply now

Date of birth: 14-Jan-2016

You can perform the following actions:

- Start new application

Can apply now

Date of birth: 14-Jan-2016

You can perform the following actions:

- Start new application

Can apply now

Date of birth: 14-Jan-2016

You can perform the following actions:

- Start new application

Can apply now

Date of birth: 01-Jan-2016

You can perform the following actions:

- Start new application

Can apply now

Date of birth: 13-Jan-2016

You can perform the following actions:

- Start new application

Back Add child

Closed in-year applications hidden.

View or change existing applications / offers Hide closed in-year applications

Application started (not yet submitted)

Date of birth: 14-Jan-2016

In year 2016
Date place wanted: 24-Sep-2016
Reason: Move into LA
Last updated 13/09/2016 16:02
Preference 1: Bishop Parker Catholic School
-1
Submission closing date 31/08/2017 23:00

You can perform the following actions:

- Close application
- Continue application
- Start new application

Can apply now

Date of birth: 01-Jan-2016

In year 2016
Date place wanted: 13-Sep-2016
Reason: Move into LA
Last updated 13/09/2016 16:20

You can perform the following actions:

- Start new application

Can apply now

Date of birth: 13-Jan-2016

In year 2016
Date place wanted: 22-Sep-2016
Reason: Move within LA
Last updated 14/09/2016 13:16
Preference 1: Barksland CoFE VA Primary School

You can perform the following actions:

- View application
- Start new application

Can apply now

Date of birth: 14-Jan-2016

In year 2016
Date place wanted: 22-Sep-2016
Reason: Move into LA
Last updated 14/09/2016 14:58
Preference 1: Bickley Primary School

You can perform the following actions:

- View application
- Start new application

Can apply now

Date of birth: 14-Jan-2016

In year 2016
Date place wanted: 15-Sep-2016
Reason: Move into LA
Last updated 15/09/2016 14:15

You can perform the following actions:

- Start new application

Application submitted

Date of birth: 14-Jan-2016

In year 2016
Date place wanted: 23-Sep-2016
Reason: Move within LA
Last updated 10/09/2016 09:30
Preference 1: Yr Ysgol Gymunedol Gymraeg

You can perform the following actions:

- Close application
- Change application
- View application
- Start new application

Can apply now

Date of birth: 14-Jan-2016

In year 2016
Date place wanted: 07-Sep-2016
Reason: Move within LA
Last updated 06/09/2016 14:03
Preference 1: Bishop Parker Catholic School

You can perform the following actions:

- View application
- Start new application

Make a new application

You currently have no children without an application.

Back Add child

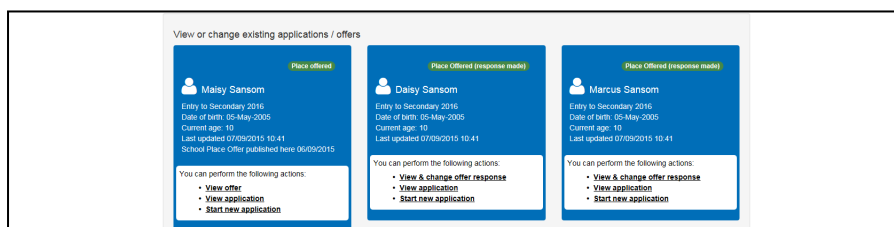
Closed in-year applications displayed.

Viewing Offers

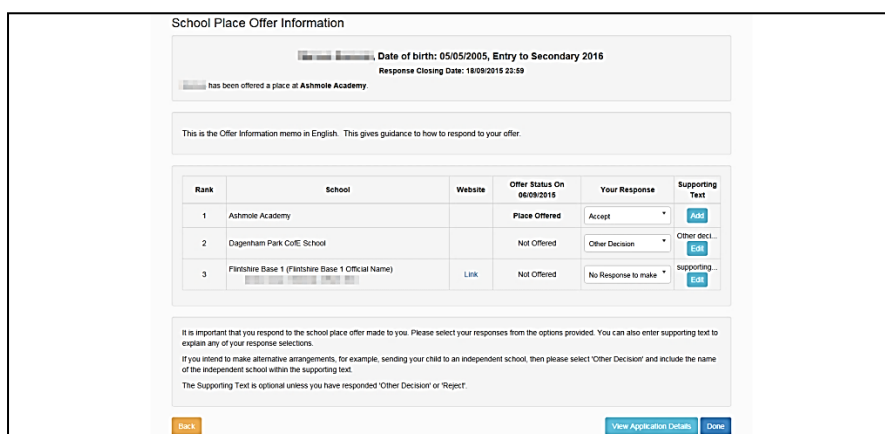
You can use the Citizen Portal to view your offers once offer information has been published. The child's application status shows as **Place Offered** on the **Citizen Portal School Places** page once an offer has been made.

NOTE: See the Publish Offer Information Online topic of the A&T Back Office Help for more information on the process of publishing offer details online.

1. Select **Citizen Portal | Home | School Places** to display the **School Places** page.



2. Select the **View Offer** hyperlink under a child's name to view the details of that child's offer.



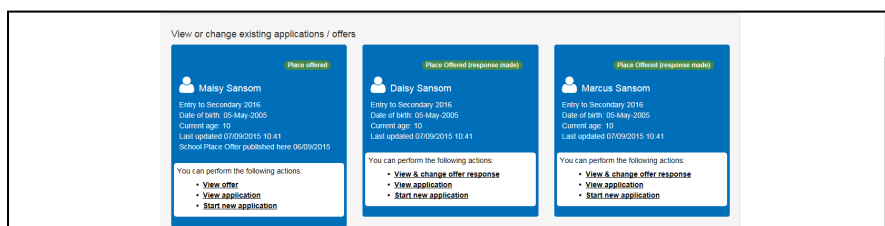
The name of the school to which the child has been offered a place is displayed in bold text at the top of the page, with a table underneath showing the offer status for each of the preferences named in that application.

If required, you can view details of the original application by clicking the **View Application Details** button.

Responding to Offers

You can use the Citizen Portal to respond to offers that correspond to applications for transfer groups that have **Enable Parent/Carer Response Online** selected. For more information on enabling responses, see the *Basic Details (E-Application Settings)* topic of the A&T Back Office Help.

1. Select **Citizen Portal | Home | School Places** to display the **School Places** page.



- Select the **View & Respond to Offer** hyperlink under a child's name to view the **School Place Offer Information** page. This page details the offer status for each of the preferences that was made in the application.

NOTE: If you have already responded to the offer, then the **View & Change Offer Response** hyperlink is displayed instead of the **View & Respond to Offer** hyperlink. The **View & Change Offer Response** hyperlink opens the **School Place Offer Information** page with the details of the previous response already filled in.

- If the Appeals functionality is enabled, an Appeals button also displays for On Waiting List or Not Offered places:

Rank	School	Offer Status On 25/09/2018	Your Response	Supporting Text	Appeal
1		Place Offered	Please select a response	Add	Not Applicable
2		On Waiting List	Response here is optional	Add	Appeal
3		Not Offered	Response here is optional	Add	Appeal

The functionality is enabled via **Process | Transfer Groups | E-App Settings** and checking or unchecking the **Enable Parent/Carer Appeal Request Online** checkbox.

- Select a response for each of the offer statuses. The available responses change depending on the offer status in question:

Offer Status	Available Responses
Place Offered	Accept
	Other Decision
	Reject
Place Accepted	Accept
	Other Decision
	Reject
Not Offered	Go On Waiting List

Making Applications

Offer Status	Available Responses
	No Response to Make
	Other Decision
On Waiting List	Other Decisions
	No Response to Make

NOTE: If the preference school is a Selective School (`BASES.SELECTIVE=true`) and the **Offer Status** for that preference is **Refused by LA (R)**, then the **Go On Waiting List** option is not displayed, because the LA has already refused the place based on the entrance test score.

5. Enter supporting text. Supporting text is mandatory for **Other Decision** or **Reject** responses, but optional for all other response types.
 - a. Click the **Add** button next to an offer to display the **Supporting Text** dialog.

- b. Enter your text, then click the **OK** button to close the dialog and save your text.

NOTE: To edit existing supporting text, click that offer's **Edit** button. The existing text is displayed in the **Supporting Text** dialog.

6. If you want to appeal, click the **Appeal** button. This allows parents to provide basic details about the type of appeal they are lodging, which is visible to Back Office users once applications are imported. This is intended only as an indication that an appeal will be lodged, rather than

facilitating the actual appeal itself.

- a. Select the Appeal Reason
 - b. The Additional appeal details is where you can add customised text to the portal. The text customisation is carried out in Citizen Portal | Admin area (sign in with a user with admin privileges) | Administration | Edit Site Texts.
For instructions see the Customising Citizen Portal School Place Applications handbook on the [One Publications](#) website.
 - c. Save.
7. Click the **Done** button to submit the response. A confirmation page is displayed.

Viewing Status Updates

You can use the Citizen Portal to view status updates sent by the LA. When your application status is updated, you are automatically sent an email and a Citizen Portal message advising you to log in to the portal to check the update.

To view the update, select **Citizen Portal | Home | School Places** and click the **Updated Status** button on the application's home tile to display the **Status for preference schools** dialog. This dialog displays the previous and current statuses for each preference, as well as any explanatory text that the LA has provided.

Making Applications

Application tile with **Updated Status** button highlighted

Rank	School	Previous Status/Date	Latest Status/Date
1	Yr Ysgol Gymunedol Gymraeg		Test statues (28/09/2016) Test supporting text
2	Penglais School		

Close

Status for preference schools dialog

Adding a Child

You can add a child from the **School Places** page, without having to navigate back to the main Citizen Portal menu and access **My Family**. The **School Places Add Child** page is slightly different to the equivalent page in **My Family**, as it does not include details that are not relevant to school place applications.

1. Select **Citizen Portal | Home | School Places** to display the **School Places** page.

School Places

Admissions On-line

If you view or edit your preferred schools, your MUST resubmit your application. Note: You may need to refer to the admissions guide
[Click here to view our web site](#)

View or change existing applications / offers

Application submitted

T. [redacted]

ANT TEST Normal Transfer Group 1
Date of birth: 14-Oct-2003
Current age: 11
Last updated 30/06/2015 13:26
Submission closing date 31/08/2015 15:00
School Place Offer published here 01/10/2015

You can perform the following actions:

- [Change application](#)
- [View application](#)
- [Start new application](#)

Make a new application

Can apply now

test1 child1
Date of birth: 01-Jan-2003
Current age: 12

You can perform the following actions:

- [Start new application](#)

Can apply now

test2 child2
Date of birth: 01-Jan-1988
Current age: 27

You can perform the following actions:

- [Start new application](#)

Back Add child

2. Click the **Add Child** button to display the **Add Child** page.

The screenshot shows the 'Add Child' form with the following fields and options:

- Forename**: Text input field.
- Middle Name**: Text input field.
- Surname**: Text input field.
- Gender**: Dropdown menu with 'Please select a gender' and a checkmark icon.
- Date of Birth**: Date picker field.
- Relationship to Child**: Dropdown menu with 'Please select' and a downward arrow. Below it, text reads: 'Your relationship to this child (i.e. you are the Father of this child)'.
- Parental Responsibility**: Radio buttons for 'Yes' and 'No'. Below it, text reads: 'If you have legal responsibility for this child, select Yes'.
- Select Address**: A list of addresses, with '200 ... Bedford' visible. Below the list is a button: 'Click to add new address'.
- Buttons: 'Cancel' (orange) and 'Add child' (blue) at the bottom.

3. Enter the child's details. All fields except **Middle Name** are mandatory.

NOTE: For Welsh users Languages fields are now populated with Null values instead of NOT/KNK where values are not asked from the applicant.

4. Enter the child's address:

- If the child's address is listed in the **Select Address** section, click on that address to select it.
- If the child's address is not listed:
 - i. Click the **Click to add new address** button to display the **Find Address Postcode** field.

The 'Find Address' form consists of:

- A label 'Find Address'.
- A house icon.
- An input field labeled 'Postcode'.
- A blue 'Search' button.

- ii. Enter the full postcode of the child's address and then click the **Search** button to display a list of addresses with that postcode.

The 'Find Address' form shows the following state:

- Input field: 'mk42 9jp'.
- Search results list:
 - 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
- Buttons: 'Not able to find your address?' and 'Search'.

- iii. Select the correct address from the list. Alternatively, click the **Not able to find your address?** button and enter the child's address details manually.
5. Click the **Add Child** button to add the child. You can now make school place applications in the child's name.

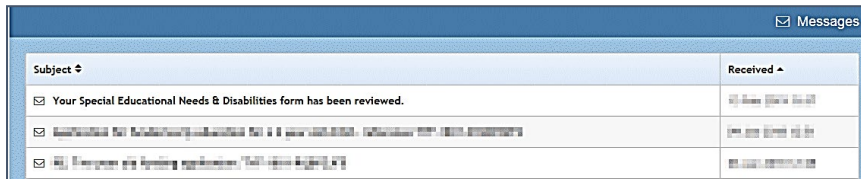
Messages

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

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

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

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



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

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