# Capita

This session shall begin shortly

Capita

Capita One
Professional
Services
**EXPO 2022**

10th February 2022

# Schedule

- Welcome & Introductions
- Presentations
  - PSP
  - System Admin Training and Mentoring
  - Data Retention and Compliance
  - Address Cleaning
- 10 Minute Break
  - Continual Improvement (Best Practice Review)
  - ATSS
  - Remote Training Catalogue
  - Bulk Day
- Closure

# Key Speakers

## Duncan McMaster
### Head of Operations
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## Simon Pixley
### Deputy Head of Operations
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## Karen Orman
### Knowledge Specialist
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## Andy Bushman
### Application Specialist
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## Victor Sanam
### Application Specialist
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# Webinar Rules

Please could we ask all participants to:

- keep your microphones muted

- Use the chat function to ask questions
  - We will read these out at the end of each presentation
  - If we run out of time to answer all of your questions, we will respond by email following the event

This webinar will be recorded and made available online following the event.

For more information on any of the products/services mentioned today, please contact your Capita Account Manager. Contact details are included in the slides, which will be shared with you after the event.

# Capita

## Capita One EXPO 2022

**Professional Services Partnership** (PSP)

# **Contents**

1. Introduction

2. What we do

3. Benefits

4. Meet the Team

5. How it works

6. Next Steps

# Introduction

The Professional Services Partnership (PSP) Service has been designed to help Local Authorities with their day to day activities, operations, support and administration. The PSP service is like having a Capita One Specialist as part of your own team.

This allows Local Authority users and IT colleagues to concentrate on the strategic use and dissemination of information to improve outcomes for their citizens.

# What we do

Address Management

Alerts

Crystal Report Writing

Data Cleaning

Data Quality Assessments and Action Plans

Importing Data

People and Student merges

PowerBI

ServiceNow Case Logging

SSRS Report Writing

System and Module Administration

User Administration

User Permissions

User Support

## Benefits

# A capita one expert as part of your own team

Direct access to a Capita One expert enables you to assign them tasks and cases, which will free-up more time within the local authority.

No drop in productivity if the PSP is on leave as Capita can cover with someone of equal experience.

Save costs on employing and training someone new in to the authority.

PSP analysts has experience and knowledge of how other authorities use the system and are able to share this wisdom and promote best practice.

## Benefits

# Quick and accurate reporting

PSP provides you with access to an extensive Capita internal pre-defined report repository, which has been built up over several years of working with other local authorities.

This will reduce the time between requesting a report and receiving it. Allowing authority staff more time to make better informed decisions.

Access to real time data as an when it is needed, results in increased confidence and providing important data at critical times, including Ofsted inspections.

## Benefits

# Efficient data cleaning

The PSP can create A&D reports and run the A&D routines based upon local retention rules. Clean data will lead to a smaller database, GDPR compliance, increased performance and reliable data. Reducing the risk of fines and downtime.

More accurate processing of admissions applications, which means a better user experience for both staff and citizens.

Improved speed of creating database backups, refreshes and disaster recovery due to reduced data. The result is less disk cost needed for backups, less time spent backing up and refreshing the data, meaning less downtime for end users and Citizens

# Direct involvement with support issues

The PSP analyst can be your first port of call for any support issues. Cases can be logged and managed by the PSP analysts if needed, saving you time communicating with the Service Desk and other Capita colleagues.

With direct access to Capita resources, the PSP analyst can provide faster response times on cases. The analyst will act as an interpreter between the LA and Capita, which helps resolve issues faster and leads to less impact on users.

# Meet the Team

**Andy Bushman**

**Kev Turner**

**Victor Sanam**

With over 50 years of One experience between them, we have a very mature and experienced PSP team who can cover any part of the One product suite.

Having a mixed background of working closely with LA's within Professional Services either onsite or remotely, as well as many years of working within the Support environment, the PSP analysts have a great knowledge of how an LA works as well as how important great service is to them.

The PSP team are also experts in report writing and dashboard creation with excellent SSRS, Crystal and PowerBI skills. This has proved to be key when providing reports and data during critical times of the year and inspections.

# Customer Feedback

*"Kev has been with Slough now a number of years and understands Slough's unique user base and the different levels of ability. Kev will change his approach depending on the end user".*

*"Andy is very knowledgeable of all of the modules and is always able to respond to queries or issues that the users have. He has excellent report writing skills and always manages to create reports that are useful. He has been excellent in helping us move to the cloud where he has been able to bridge the gap between the technical Capita staff and our own technical staff".*

*"Kev is a part of the SI Team and treated as such, we all have regular meeting, going through the work we are doing and if we are investigating any issues we usually ask each other before we log a case with service desk and Kev does the same".*

*"Able to get Management information from the system via SSRS as we do not have those skill in house".*

# Customer Feedback

*"Excellent delivery.  He listens to what the user wants and delivers.  Any issues with the delivery are actioned in a timely manner. He manages his time well and  is responsive to emails and keeps us updated".*

*"Kev delivers on time, he has a very good knowledge base of the application as well as reporting".*

*"He is able to communicate with users on a user level. He is always cheerful and approachable with a can do attitude no matter what is thrown at him to fix for us".*

*"Helps ease the pressure from our very small team".*

*"Supportive and helpful in resolving queries".*

# How it works

Flexible remote working hours to suit your needs

LA plan and prioritise workload

Direct system admin access

Local user account

Monthly reporting

Regular reviews of PSP service with PSP Manager

## Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

# Capita

**Thank you**

# Q&A

**Any questions?**

# Capita

## Capita One EXPO 2022

## System Admin Training and Mentoring

# Welcome & Introductions

Your speaker:



Karen Orman

Senior Knowledge Specialist

# Agenda

1. System Admin - Where to start?

2. Our Solution

3. Next Steps

# 01

## System Admin

## Where to Start?

# One Coordinator Role



- **New to the role?**

- **Looking to recruit?**

- **Reorganisation of responsibilities?**

- **Support for One is within a team who are already stretched too thinly across other systems?**

- **No resources to fill and recruit?**

# Involvement from 0 - 25



We help parents get their children places in pre-school provision and monitor their development online
**Early Years, Children Centres &**

We maintain core information about schools and other education providers all available online
**Bases, Governors and Training Manager**

We help parents obtain financial support for their children's education and citizens can apply online
**Free School Meals & Clothing**

We help parents get their children places in formal schooling; they can apply online, and we can share data with schools online
**Admissions & GIS**

We help get children physically to their schools and parents can apply online
**Transport, GIS & Route Optimisers**

If there are issues, we support interventions designed to help address them with online access for citizens and professionals
**SEN-ALN-IDP, Case Management , Equipment, Hearing & Vision (Hi-Vi), Exclusions & Inclusions**

We monitor children's attendance and attainment at school and integrate with other complimentary systems
**Data Sharing, Attainment, Attendance, out of area Attendance collection, ePEP, Music, Child Employment & Entertainment**
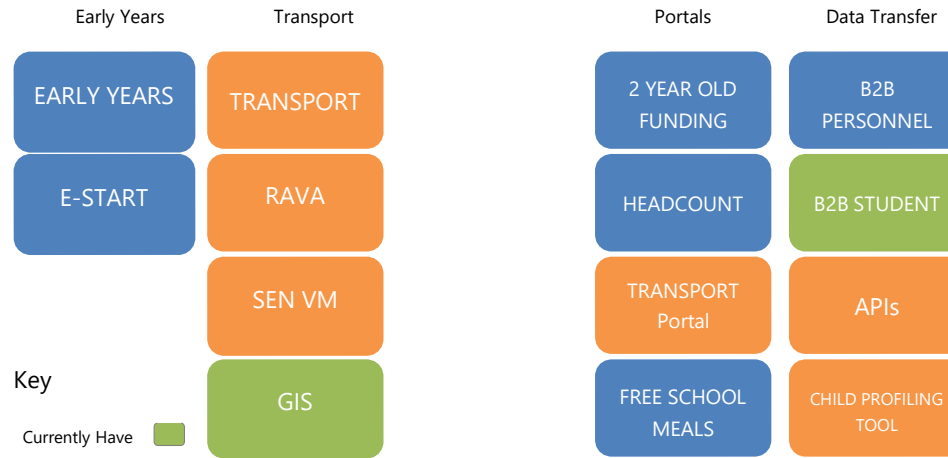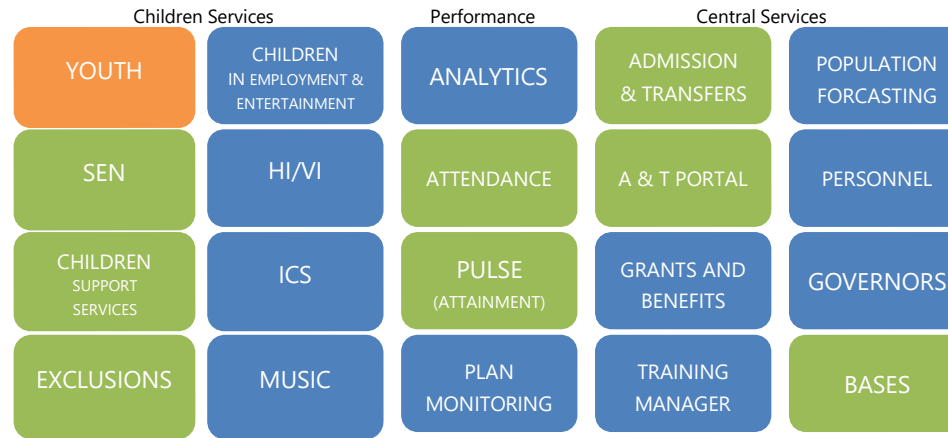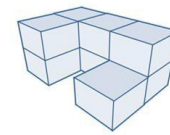
We support services working with young people to reduce and prevent anti-social and criminal behaviour
**YJ - Youth Justice**
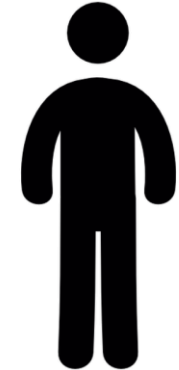
We explore interactions between all the decisions made previously to gain insights and help evaluate effectiveness, sharing SSRS reports securely with schools and other agencies
**Single View Reporting & One Insight**

We help identify children at risk of becoming NEET – not in Education, Employment or Training and monitor their activity
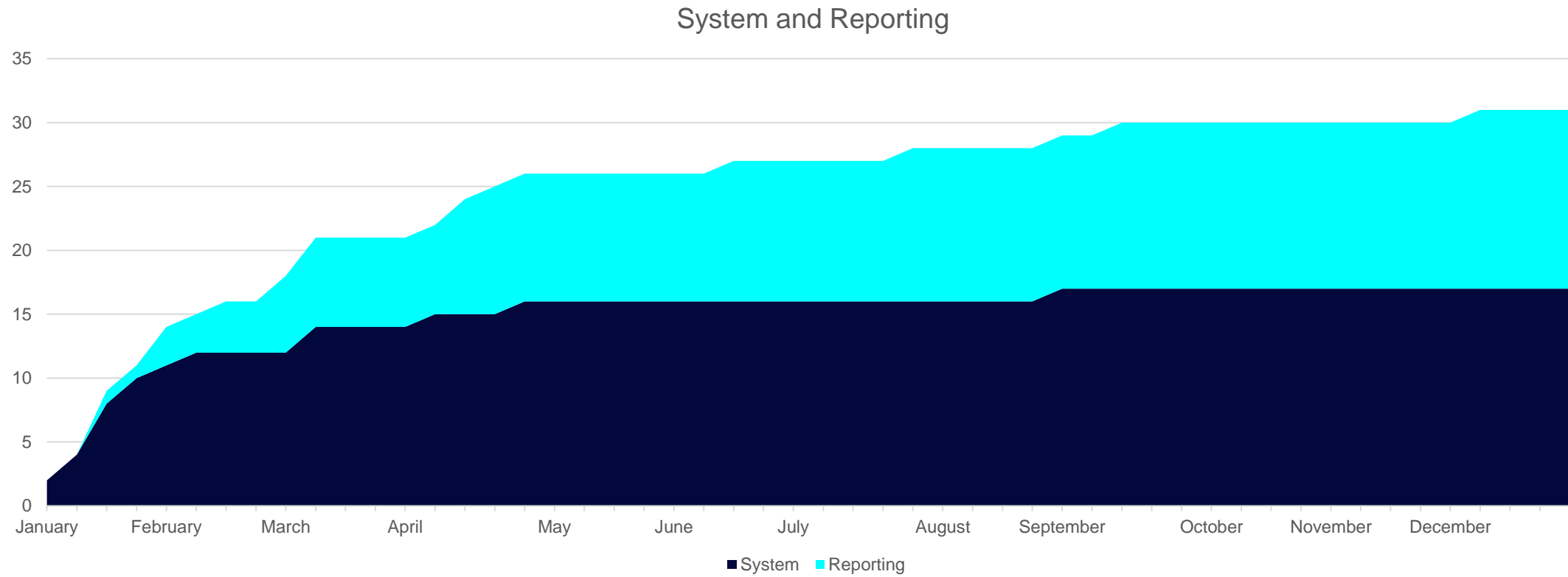**IYSS - Integrated Youth Support Services**

# CURRENT MODULES

## Children Services

| | |
|---|---|
| YOUTH | CHILDREN IN EMPLOYMENT & ENTERTAINMENT |
| SEN | HI/VI |
| CHILDREN SUPPORT SERVICES | ICS |
| EXCLUSIONS | MUSIC |

## Performance

| |
|---|
| ANALYTICS |
| ATTENDANCE |
| PULSE (ATTAINMENT) |
| PLAN MONITORING |

## Central Services

| | |
|---|---|
| ADMISSION & TRANSFERS | POPULATION FORCASTING |
| A & T PORTAL | PERSONNEL |
| GRANTS AND BENEFITS | GOVERNORS |
| TRAINING MANAGER | BASES |

## Early Years

| |
|---|
| EARLY YEARS |
| E-START |

## Transport

| |
|---|
| TRANSPORT |
| RAVA |
| SEN VM |
| GIS |
| CASEWORKER APP |

## Portals

| |
|---|
| 2 YEAR OLD FUNDING |
| HEADCOUNT |
| TRANSPORT Portal |
| FREE SCHOOL MEALS |

## Data Transfer

| |
|---|
| B2B PERSONNEL |
| B2B STUDENT |
| APIs |
| CHILD PROFILING TOOL |

## Key

| | |
|---|---|
| Currently Have | (green) |
| Don't Have | (blue) |
| Aspire to have | (orange) |

## Technical

| | | | | | | |
|---|---|---|---|---|---|---|
| ORADS | OTAS | OTCSS | HOSTING | WEB-SERVER | WEB-SERVER 2 | HOSTED eStart |

## Professional Services

| | | | |
|---|---|---|---|
| REMOTE PSP | PSP | A&T | WEB-EX |

| Eng | Val | Linked Modul | Activity | January | February | March | April | May | June | July | August | September | October | November | December |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | Holiday | England Public Holidays | | | | F M | F M | | | M | | | | F M |
| | | Holiday | India Public Holidays | | | | | | | | | | | | |
| | | Incident | Incident raise rate | | | | | | | | | | | | |
| | | Release | One Main Release Committed Date | | | | | | | | | | | | |
| | | Release | Upgrade in Test | | | | | | | | | | | | |
| | | Release | Upgrade in Live | | | | | | | | | | | | |
| Y | | A&T | **Secondary School Applications** | | | | | | | | | | | | |
| Y | | A&T | Schools Admission Appeals Survey | | | | | | | | | | | | |
| Y | Y1 | A&T | Normal Round ADT Sec Phase to Other LA | | | | | | | | | | | | |
| Y | Y1 | A&T | Normal Round OA schools | | | | | | | | | | | | |
| Y | | A&T | PLR late application ADT 1st week dec | | | | | | | | | | | | |
| Y | Y1 | A&T | Ranking from schools January | | | | | | | | | | | | |
| Y | Y1 | A&T | ALT LA to LA (Secondary) | | | | | | | | | | | | |
| Y | Y1 | A&T | ALT to other online suppliers (Secondary) | | | | | | | | | | | | |
| Y | Y1 | A&T | ATF to schools | | | | | | | | | | | | |
| Y | Y1 | A&T | **Primary School Applications** | | | | | | | | | | | | |
| Y | Y1 | A&T | Normal Round Own Admission schools | | | | | | | | | | | | |
| Y | Y1 | A&T | Ranking from schools March | | | | | | | | | | | | |
| Y | Y1 | A&T | ALT (Primary) | | | | | | | | | | | | |
| Y | Y1 | A&T | May - July APT send to Other Las | | | | | | | | | | | | |
| Y | Y1 | A&T | IN YEAR | | | | | | | | | | | | |
| Y | Y1 | A&T | 1st march Secondary offer date | | | | | | | | | | | | |
| Y | Y1 | A&T | 16th April Primary offers | | | | | | | | | | | | |
| Y | Y1 | A&T | Prep for Online June - Aug | | | | | | | | | | | | |
| Y | Y1 | A&T | Offer routines Secondary | | | | | | | | | | | | |
| Y | Y1 | A&T | Offer routines Primary | | | | | | | | | | | | |
| | Y | ATT | Secondary school attendance return. | | | | | | | | | | | | |
| Y | | ATT | Parental Responsibility (Attendance & Behaviour - PRAB) | | | | | | | | | | | | |
| Y | Y | EY | Add new Financial Year | | | | | | | | | | | | |
| Y | Y | EY | Import Headcount Data | | | | | | | | | | | | |
| | | EY | Census Headcount Window | | | | | | | | | | | | |
| Y | | EXCL | Schools Exclusion Appeals Survey | | | | | | | | | | | | |
| | Y | EXCL | Exclusions return | | | | | | | | | | | | |
| Y | | EY | Free early eudcation for two year-olds | | | | | | | | | | | | |
| Y | | EY | Early Years Census (EYC) | | | | | | | | | | | | |
| Y | Y1 | GIS | GIS Batch Processes | | | | | | | | | | | | |
| Y | Y | G&B | Claims for start of new year | | | | | | | | | | | | |
| Y | Y | G&B | Roll Forward claims | | | | | | | | | | | | |
| Y | | PUL | Foundation Stage Profile | | | | | | | | | | | | |
| Y | Y | PUL | Key Stage Teacher Assessments | | | | | | | | | | | | |
| Y | | PUL | Phonics: Year 1 Roll-out | | | | | | | | | | | | |
| Y | Y | PUL | Key Stage 2 Teacher Assessments | | | | | | | | | | | | |
| Y | Y | PUL | Key Stage 3 Teacher Assessments | | | | | | | | | | | | |
| Y | | PUL | Statutory School Census | | | | | | | | | | | | |
| | Y | PUL | PLASC Annual | | | | | | | | | | | | |
| | Y | PUL | PLASC Attendance | | | | | | | | | | | | |
| | Y | PUL | Post 16 PLASC | | | | | | | | | | | | |
| Y | | SEN | SEN2 | | | | | | | | | | | | |
| Y | | SEN / CS | Alternative Provision Census | | | | | | | | | | | | |
| Y | Y | SEN / CS | EOTAS | | | | | | | | | | | | |
| | Y | SIMS / P | NDC Teacher assessments to WG | | | | | | | | | | | | |
| Y | Y | SYS | Run NCY Roll forward routine | | | | | | | | | | | | |
| Y | Y1 | TRAN | Transport Batch assessmnet around offer date | | | | | | | | | | | | |
| Y | Y1 | TRAN | Transport Batch assessmnet around offer date | | | | | | | | | | | | |
| Y | | IYSS | NCCIS Run monthly through year | | | | | | | | | | | | |
| Y | | IYSS | Annual Release implementation | | | | | | | | | | | | |
| Y | | IYSS | Annual September Guarantee return | | | | | | | | | | | | |
| Y | | IYSS | Annual Activity Survey statutory submission | | | | | | | | | | | | |
| Y | | IYSS | Annual roll up of students NCY | | | | | | | | | | | | |
| Y | Y | YJ | YJ Statutory Returns, runs Quarterly | | | | | | | | | | | | |
| Y | Y | YJ | YJ Annual Return Submission | | | | | | | | | | | | |

# System and Reporting
## Knowledge required to maintain the system and support users



System and Reporting

# Core Data
## B2B, Address, Bases, Attendance



Strategic Data

Legend: B2B, Addresses, Bases, Attendance

# Module Knowledge



Legend: A&T, Early Years, SEND, CSS, IYSS, Transport, Exclusions, Grants and Benefits

# Learning Curve



**Knowledge and Skills** (y-axis)

**Time** (x-axis)

= Monthly Care Session

02

**Our
Solution**

# Annual Package
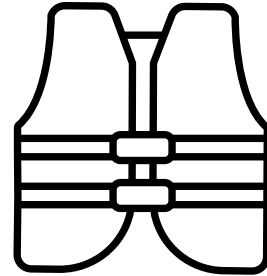
Support and guidance

**System Admin Training and Mentoring**

# System Admin Training and Mentoring

- Advice and Support
- Planning
- Issue tracking

- System Admin Training
- House keeping
- Ask the expert sessions

**Core Support**

**Skills**

**Module Review**

**Reporting**

- Business process
- Health Check
- Navigation
- Challenge
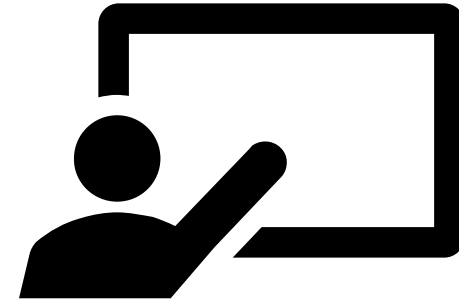
- Crystal Training
- Report Builder
- Module Reporting
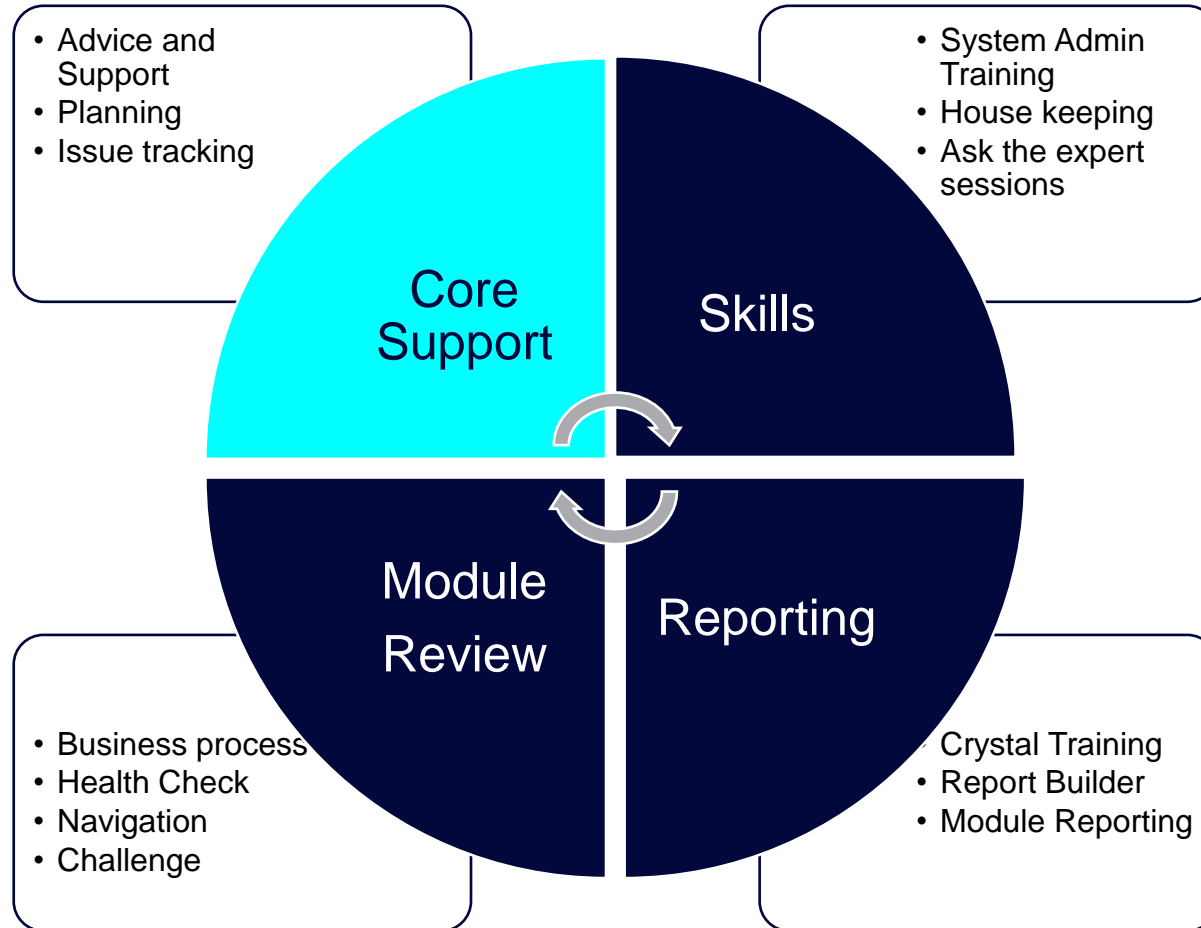
**Core Support**

- Direct contact with a knowledge expert, providing advice and support

- Email address dedicated to support

- Regular catch-up meetings throughout the year

- Issue triage

- Advice and support for this unique role

# Core Support

Quick access to a knowledge expert who understands your One module process

Solutions for issues, circumstances change we will find and advise on how to work though challenges

You gain confidence on how to liaise with Capita

Support you to support your users

## Skills

Training and development of skills

- System Admin, training in bite size 'ask the expert' sessions
- Module Administration training
- House Keeping of core strategic data

# Skills

Quickly skill up on how to support your users

Understanding the many interfaces of One – so you can represent One within your Local Authority

Little and often training – slots in with your busy schedule

Training with sharing of best practice of use of the software

Sound foundation of what, why and how

# Reports

Reporting with Crystal, SSRS and Power BI

- Crystal training for beginners and upwards
- How reporting works with the One suite
- Workshop approach to tweaking reports
- Report Builder - overview
- Integration with Power BI - overview

Commercial in confidence

# Reporting

Support you to support your users

Orientation around data tables and views

Introduce or adapt reports you have using SSRS which are quicker and integrate better with Excel

'Art of the possible' solutions for your users

# **Module Review**

Module by Module

- Business Process it supports

- Overview of each module

- Review of how it is being used within your LA

- Health check

## **Module Review**

We help you understand what each module can do and how your users are using them

Support your services day-to-day

Prioritise service needs

Understand your users and their challenges

# Meet the team
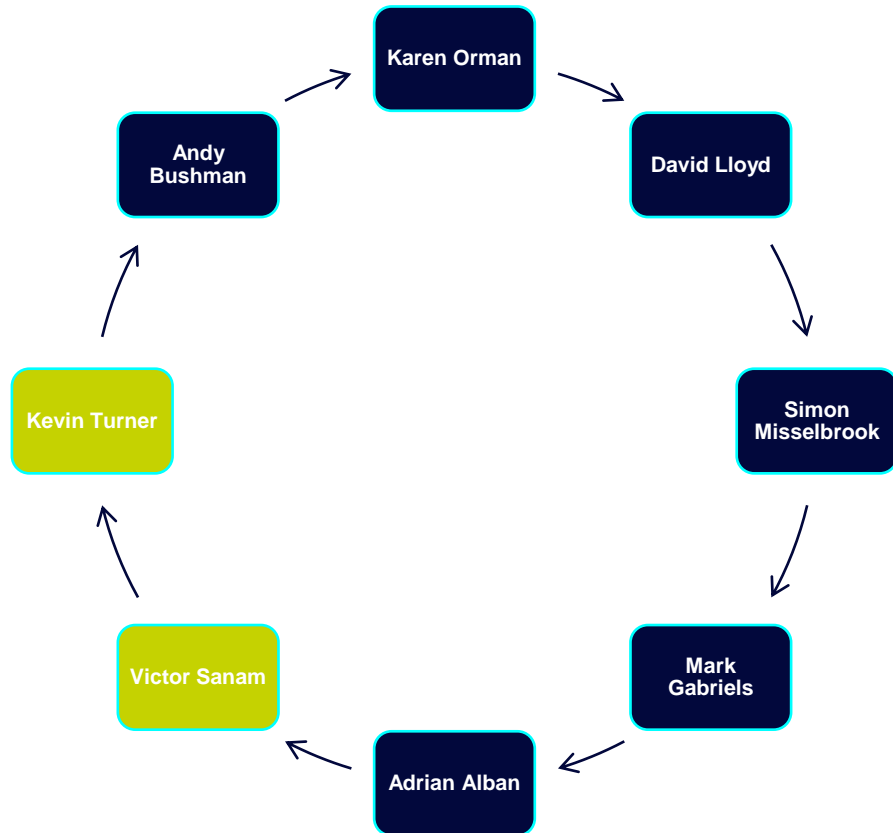


- **70+ Years of module knowledge**

- **No one person is an expert in all modules**

- **Some of us have supported / worked with one since the introduction of V3!**

- **Many of us have worked in local government and 'walked in your shoes'**

## Our Solution

Core package - linked to the number of modules

Get the best value from your data

Develop a sound foundation of system knowledge

Get the best out of your investment

03

Next Steps

# Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

# Capita

Thank you

# Q&A

**Any questions?**

# Capita

## Capita One EXPO 2022

## Archive & Delete

# Welcome and Agenda

1. Meet the experts
2. What is Archive and Delete
3. Key benefits
4. How can we help
5. What we can offer

# Meet the Experts

**Andy Bushman**
**Application Specialist**
**Andy.Bushman@capita.com**

**Victor Sanam**
**Application Specialist**
**Victor.sanam@capita.com**

# What is Archive and Delete?

## What can it do?

- Create Archive copies of data

- Delete data

- Remove links

- Delete data based on a 'Right to be forgotten request'.

## Requirements

- Setup of defaults in System Admin

- Setup of Scheduled tasks

- Creation of  SSRS identification reports

- Creation of SSRS archive reports (if required)

- SQL for the creation of the reports

- Process flow

# How can Professional Services help?

- Understanding

- Setup TEST and LIVE

- Report pack

- Alerts

- Previous experience

- Expert advice

- Professional Services can also create bespoke archive reports if required.

# Session 1 - Overview of functionality

- **Purpose of Archive and Delete**

- **Data retention policies**

- **System defaults**

- **Alerts**

- **Permissions**

- **Running identification reports**

- **Archiving data**

- **Marking records for deletion**

- **Scheduled tasks**

# Session 2 and 3 – Setup TEST and LIVE

## Setup

- System defaults

- Permission groups

- Schedule tasks for deletion and delete log file purge

- Alerts (maximum of 6)

- Ensure example archive and identification reports are connecting to the correct data source

# Reports - Identification

**Inactive Students / People**

**Not Updated Students / People**

**GDPR breach**

**Base Contacts ended**

**Governors ended**

**Unattached *Students / People***

# Reports - Checking

**Dependency Checker**

**Delete Progress**

# Alerts

Record identified for deletion but not yet added to the delete routine.
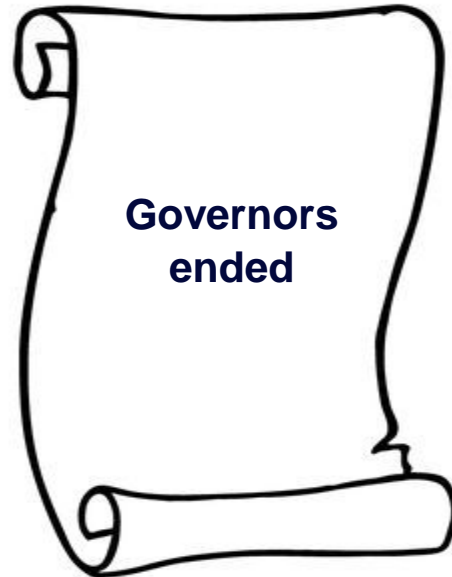
Record added to the delete routine.
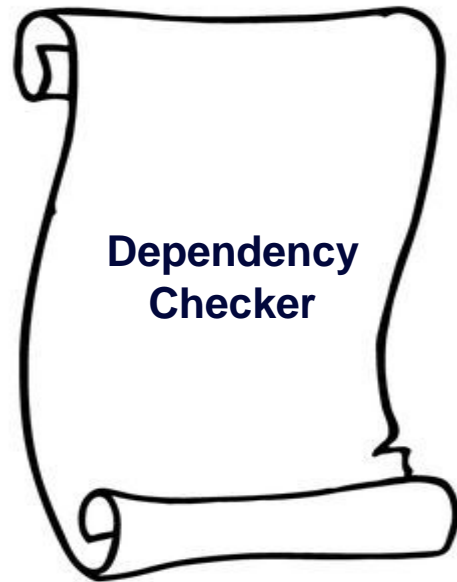
Record has been selected to have information archived.

Records have completed the archive process and are ready to be deleted.

Records have failed the archive process.

Records failed the delete process

# Key Benefits

**Compliance with the Local Authorities retention policies**

**Compliance with the GDPR principle of:**

- Storage limitation
- Accuracy
- Reduce the risk of fines

**Smaller database footprint:**

- Improving response speeds to record access and reporting
- Improving speed of disaster recovery with faster back up and recovery
- Reducing storage space required for both live operation and backup

**Cleaner data:**

- Better reporting upon which to make better decisions
- Increased productivity by making records easier to find
- Improved FOI

# Customer Feedback

"We had submitted our requirements to Capita in advance of the training and Capita were able to explain how each element could be met including areas which could be addressed outside of the A&D process. Andy showed great patience, particularly as some of the attendees were looking at this functionality for the first time and there needed to be quite a bit of technical intervention to deal with some of our technical issues".

"During the various sessions we experienced a number of technical issues relating entirely to our set up and this caused us to postpone a number of sessions. Capita were flexible enough to rearrange sessions at short notice and respond to ad hoc queries throughout"

"The benefit of the service was to increase our confidence in using it".

## Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

# Capita

**Thank you**

# Q&A

**Any questions?**

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**Address
Cleaning**

# Agenda

- **Background of the situation**
- **Our Solution**
- **Benefits**
- **Q&A**
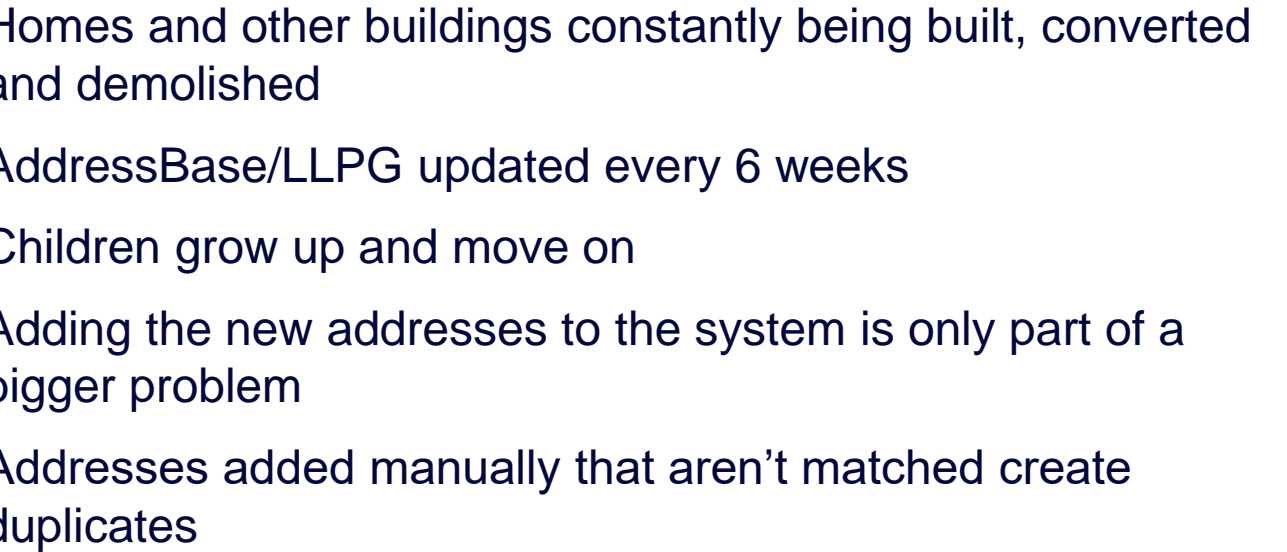
Capita One

# Background

# Scenario

- Homes and other buildings constantly being built, converted and demolished

- AddressBase/LLPG updated every 6 weeks

- Children grow up and move on

- Adding the new addresses to the system is only part of a bigger problem

- Addresses added manually that aren't matched create duplicates

## Challenges
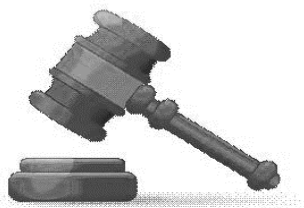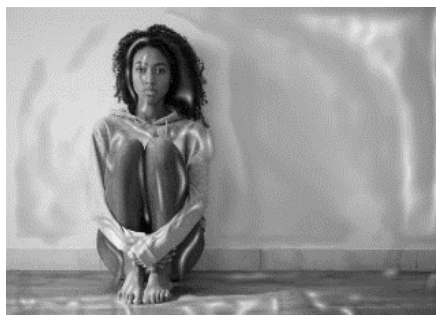
An incorrect or incomplete address can cause

- On self-service portals,
  - Confusion for the end user
  - Reputational damage to Local Authorities

- When posted,
  - Delays in the communication being received
  - Inconvenience and embarrassment to the intended recipients
  - Risk to vulnerable children and youth
  - Serious data breaches and privacy issues where Personally Identifiable Information is involved leading to **GDPR** liabilities

# More Challenges

## Admissions & Transfers (A&T)

Missing geocodes - cause delays in the data being measured.

Manual geocodes – results in wrong school allocations

## Special Education Needs & Disabilities (SEND)

EHC plans sent to wrong address resulting in potential GDPR breach

Letters sent to wrong separated parent (more so, if details must not be sent to one of the parents)

## Children In Education & Entertainment (CIEE)

Licences, work permits and details of child performers and their schedules sent to wrong address

## Early Years and Portals

May affect yearly depravation calculation

TYOF, EYPP details contain Income Support, etc details

May have sensitive information like NI numbers, DoBs etc

## Integrated Youth Services (IYSS) & Youth Justice (YJ)

The relevant Lead Authority being determined using incorrect Client address, which impacts statutory reporting

Bail conditions and restrictions using wrong address information which is shared between other agencies and services including the Police and CPS

## Transport

Eligibility can't be calculated based on walking distance

Correct Passenger journeys depends on correct geocoding

# Some of the possible reports sent via post with personal information

Ed Psych Report

Health/Medical reports

Social Care Advice

Copies of Draft and Final EHCPs

General Communications likely to include child details

Fixed Penalty Notices

Prosecution details

Court Order Details

Parental Contracts

Consent Forms

General Comms including the child's details

Exclusions details

Homework

Reintegration and Placement details

Parental Preference details

Governors and Appeal Meeting details

General Comms
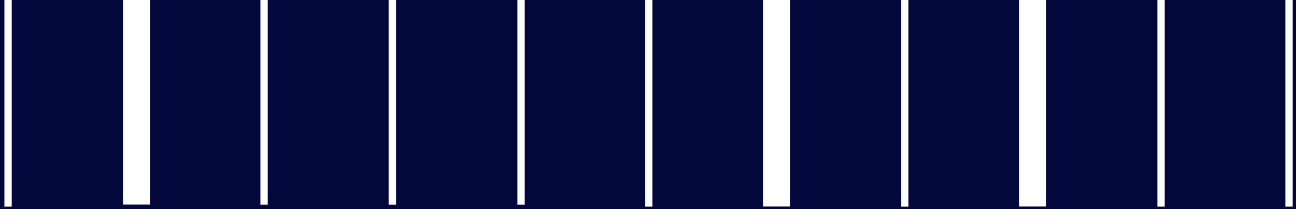
Capita One

Our Solution
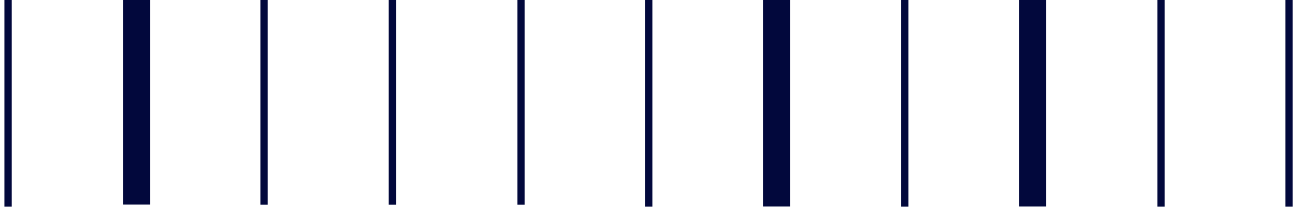
# Address Cleaning
**Work Package**

- What is **Address Cleaning** *or* **Address Tidy?**

- Why do you need **Address Cleaning?**

- What are the benefits of **Address Cleaning?**

# What is

# Address Cleaning

# Work Package

- Capita led process that helps you see the current status of the Address data at your Local Authority

- Helps clean the address data to a minimum of 95% accuracy using inbuilt routines and bespoke scripts for fuzzy matching.

- Helps with accurate statutory reporting

- Done by Capita consultant with minimal need from LA users once the job has started

- Done in TEST first and once satisfied with the results, it is performed in LIVE

# Why

# Address Cleaning

# Work Package
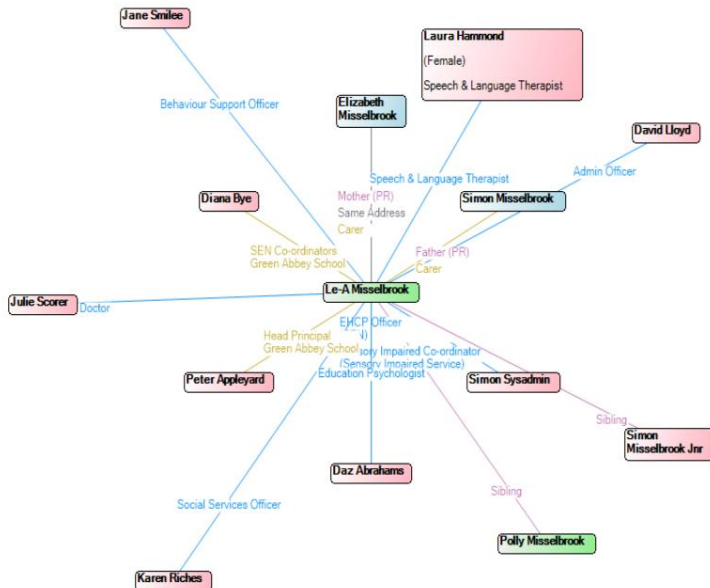


- Addresses are a fundamental part of the Capita One system. High quality address data is of critical importance to many of the services which rely on the system for their day-to-day processes.

- Manually added addresses will not have all the information required including eastings, northings and UPRNs

- Most important of all, Personal and Confidential information can be sent to a wrong address resulting in effects ranging from embarrassment to GDPR penalties and legal suites.

- Duplicate addresses in the system cause confusion and inaccurate picture on Social Networks

# Why

# Address Cleaning

# Work Package

**Data security incident trends Q2 2021/22**

Source: https://ico.org.uk/for-organisations/sme-web-hub/common-data-protection-mistakes-and-how-to-fix-them/

| | Cen | Cha | Edu | Fin | Ger | Hea | Just | Lan | Leg | Local government | Mar | Med | Mem | Onli | Poli | Reg | Rel | Ret | Soc | Tra | Uti | Grand Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Alteration of personal data | | | 1 | 2 | | 4 | | | | 1 | | | | 1 | | | | | | | 1 | 10 |
| Data emailed to incorrect recipient | 9 | 19 | 78 | 33 | 12 | 63 | 2 | 30 | 72 | 32 | | 3 | 5 | | 6 | | | 16 | 12 | 2 | 3 | 397 |
| Data of wrong data subject shown in client p | 3 | 1 | 5 | 2 | 1 | 5 | | 2 | | 3 | | 1 | | | | | | 3 | | | | 26 |
| Data posted or faxed to incorrect recipient | 11 | 6 | 14 | 23 | 2 | 56 | 3 | 9 | 24 | 28 | | 1 | | | | | | 11 | 1 | 1 | 2 | 192 |
| Failure to redact | 5 | 5 | 16 | 1 | 1 | 8 | 4 | 2 | 13 | 42 | | | 1 | | | 1 | 1 | 2 | | | | 102 |
| Failure to use bcc | 2 | 7 | 11 | 4 | 6 | 10 | | 7 | 1 | 4 | 1 | | 4 | 2 | | | | 7 | 1 | 4 | 1 | 72 |
| Incorrect disposal of hardware | | | 1 | | | 1 | | | | | | | 2 | | | | | | | | | 4 |
| Incorrect disposal of paperwork | 1 | 1 | 2 | | | 3 | | | 1 | 1 | | | | | | | | | 2 | | | 11 |
| Loss/theft of device containing personal data | | 4 | 8 | 3 | 1 | 8 | 2 | 1 | 6 | 6 | | | 1 | | | | | 2 | 1 | 2 | | 45 |
| Loss/theft of paperwork or data left in insecu | 6 | 20 | 10 | 5 | 4 | 52 | 10 | 6 | 11 | 11 | 2 | 2 | | | 1 | | | 5 | 16 | 3 | | 164 |
| Not Provided | | 2 | 12 | 8 | 3 | 14 | | | 9 | 6 | | | 1 | | | | | 6 | 1 | 2 | | 64 |
| Other non-cyber incident | 14 | 19 | 59 | 23 | 9 | 99 | 13 | 18 | 9 | 40 | 1 | 1 | 10 | | 4 | 2 | 15 | 6 | 10 | 1 | | 353 |
| Unauthorised access (non-cyber) | 2 | 5 | 24 | 13 | 11 | 67 | 3 | 10 | 6 | 23 | 2 | 2 | 2 | 1 | | 1 | 13 | 11 | 10 | 3 | | 209 |
| Verbal disclosure of personal data | 1 | 5 | 9 | 6 | 1 | 12 | 1 | | 13 | 9 | | 1 | | | | | 2 | 3 | 1 | 4 | | 68 |

**Address Cleaning**

# Benefits

## Improved Confidence in the system

- Accurate distances recorded in the Admissions and Transfers module - School allocations are made accurately, there by no children misses out or gets placed in a school they don't qualify for

- Important documents sent to the correct addresses

- More accurate routes calculated in the Transport module

## User time productively spent

- Accurate address data available for selection through the self-service portals, significantly reducing records going to conflict management

- Data accuracy enables Web Address Validation (WAV) to be enabled between Capita One and SIMS which significantly reduces the records going into B2B Conflict Management

- Less time spent on processes like Appeals

# Better care available for the vulnerable

- Local Authority teams can spend more time with the vulnerable children and young adults by using the Social Network and other available tools because of more accurate addresses

- Less time spent on cross verifying the system for people that live together

## Cleaner address data

- Improved address data quality

- Duplicate addresses are removed

- Old incorrect addresses are made inactive

- Need to manually add address records is drastically reduced

# What it means to the users?

## One users

- More robust system due to tidier address base

- Confidence in using the addresses from One system

- Negligible data breaches due to incorrect correspondence

## System Admins

- Any new information is updated against the existing addresses in One

- Dwellings and street data is accurately updated

- Correct street details get linked to dwellings

## DBA

- Faster system response times

- Work is done with no downtime to the system.

- All that needs doing before the work commences come with detailed instructions.

# Implementation

## Step 1

**Agenda**

- Analyse Address data

- Backup Address tables

- Bulk Match existing addresses with LLPG/AddressBase Premium data

- Remove telephone numbers and OSAPRs

**Outcome**

- Full address database matched to any existing database using standard system matching.

# Implementation

## Step 2

**Agenda**

- Fuzzy match remaining addresses
- Update dwelling and street data to match LLPG/AddressBase Premium data
- Add missing streets
- Re-link dwellings to correct street records
- Add missing properties

**Outcome**

- Full address database imported into One and matched to LLPG tables using standard system and fuzzy matching.

# Implementation

# Step 3

## Agenda

- Remove blank addresses

- Remove unused dwellings and streets

- Remove duplicate addresses

- Analyse address data

## Outcome

- At least 95% or more addresses in One now matching LLPG/AddressBase data

# Implementation

# Step 4

## Agenda

- Discuss Outcome
- Request sign off so the steps can be run in live

## Outcome

- LA happy to sign off for TEST and to have the same procedure done on LIVE involving the same steps.

# Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

# Capita

**Thank you**

# Q&A

**Any questions?**

# Comfort Break
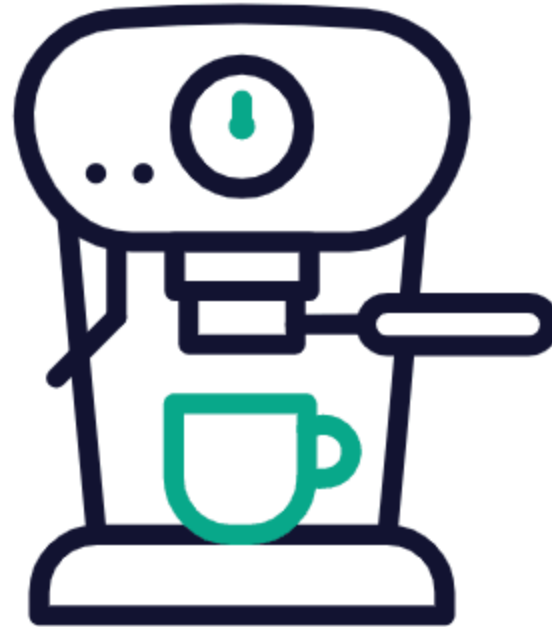
This session shall resume shortly

Capita

Capita One
EXPO 2022

**Continual
Improvement
Programme**

# Welcome & Introductions

Your speaker:



Duncan McMaster

Head of Operations

Capita One Education

# Agenda

1. The Challenge
2. How Can We Help
3. Next Steps

01

The
Challenge

# A Mature Database
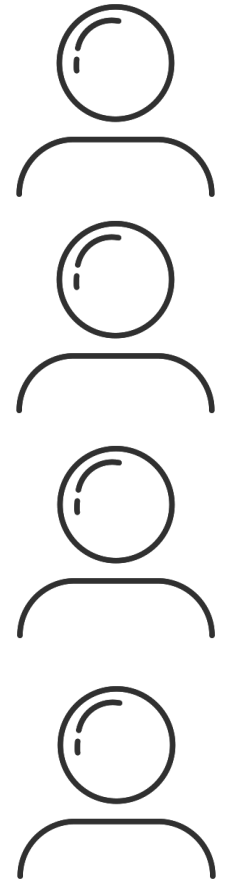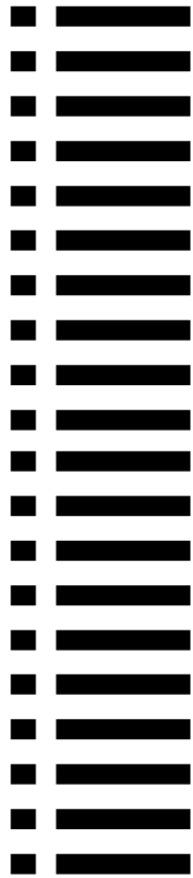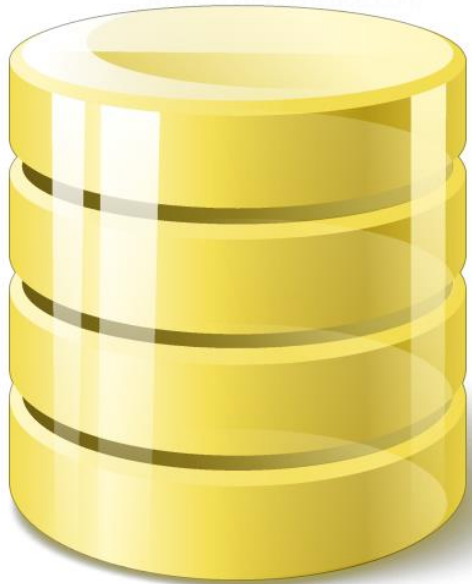
# Experience Profile



- Better user experience
- Bringing external recording into the system
- Time efficiency savings
- Improved data quality
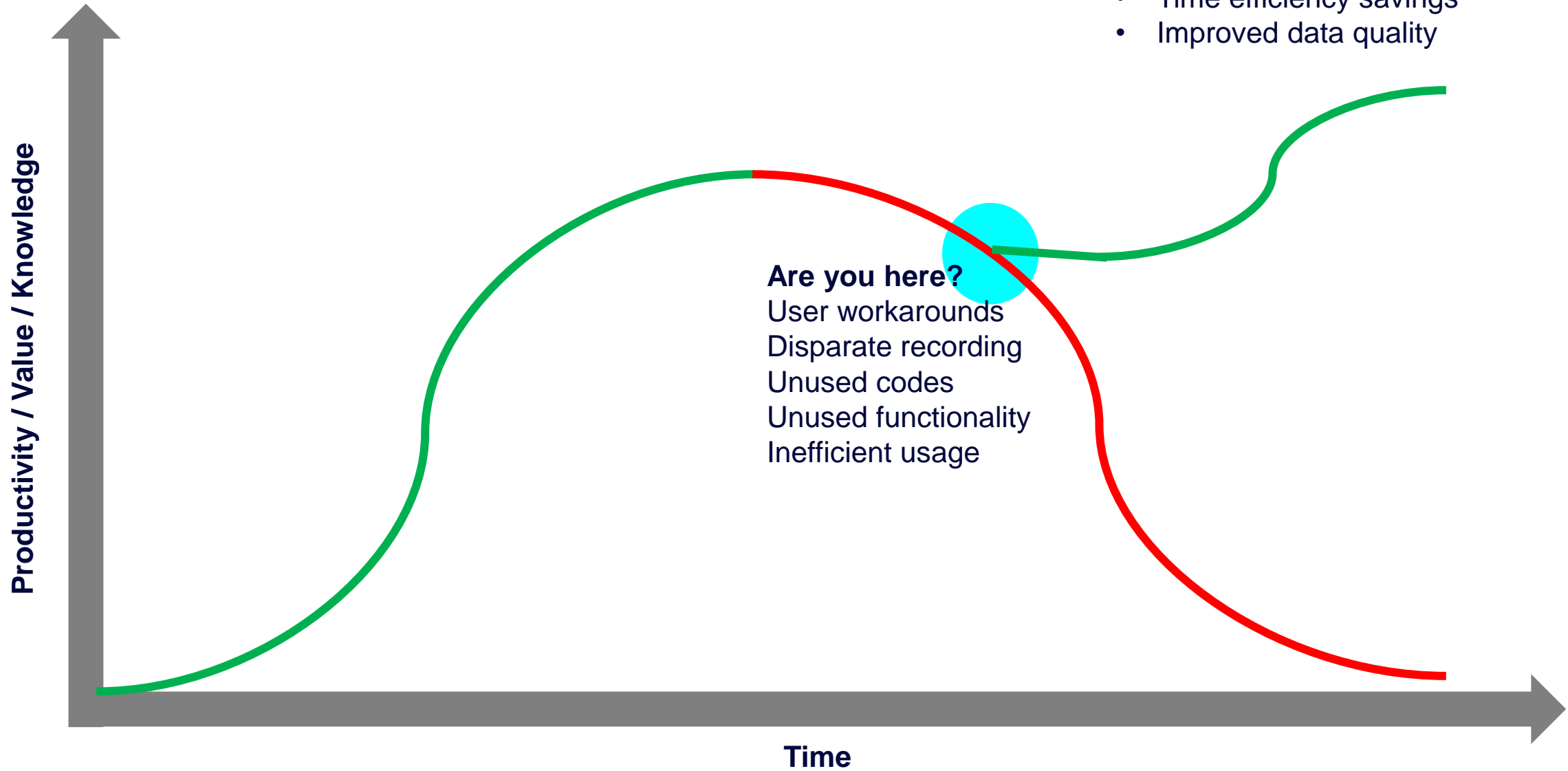
**Are you here?**
User workarounds
Disparate recording
Unused codes
Unused functionality
Inefficient usage

Productivity / Value / Knowledge

Time

# Module Knowledge

**02**
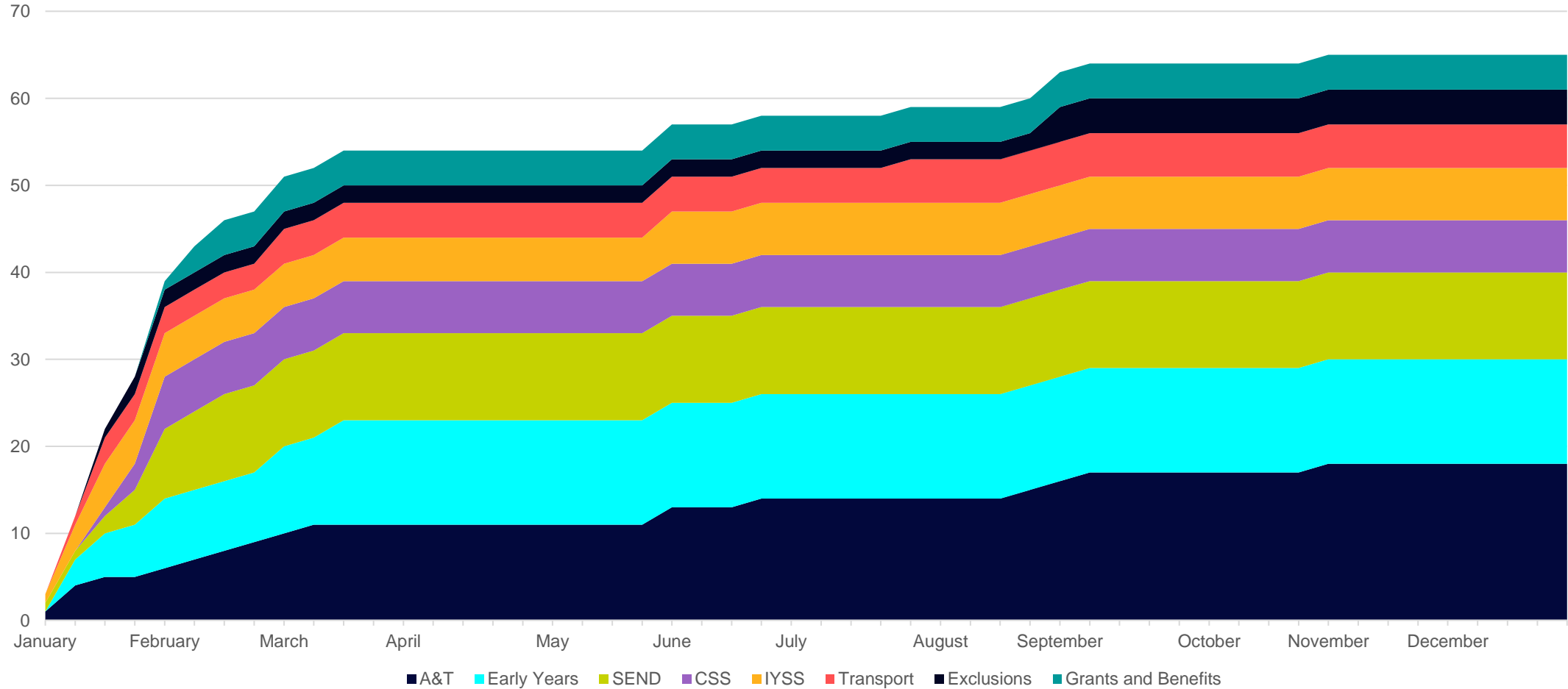
**How we
can help**

Capita Knowledge and Experience = 150+ Years
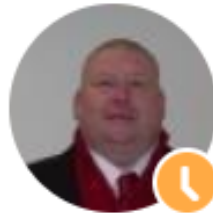
# Continual Improvement Through Best Practice Review

Prioritise recommendations
Identify resources
Implement
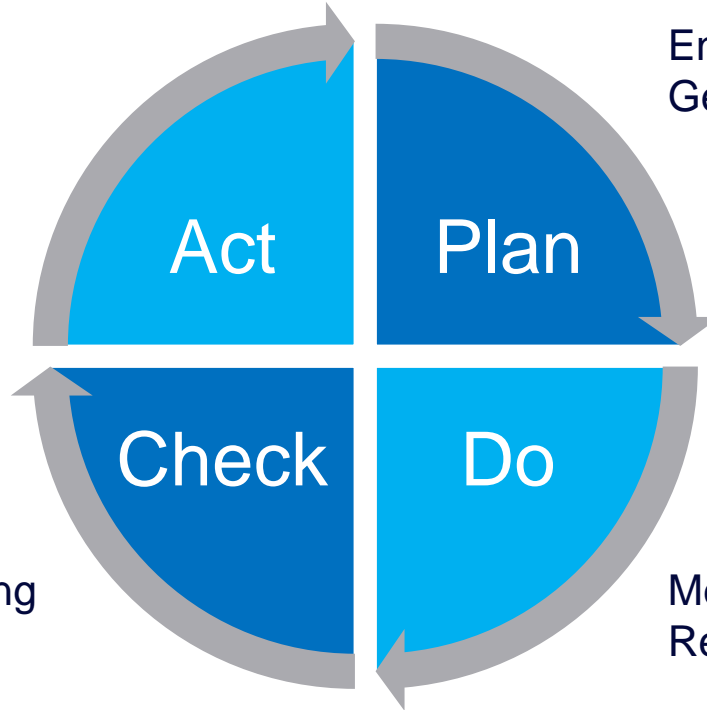
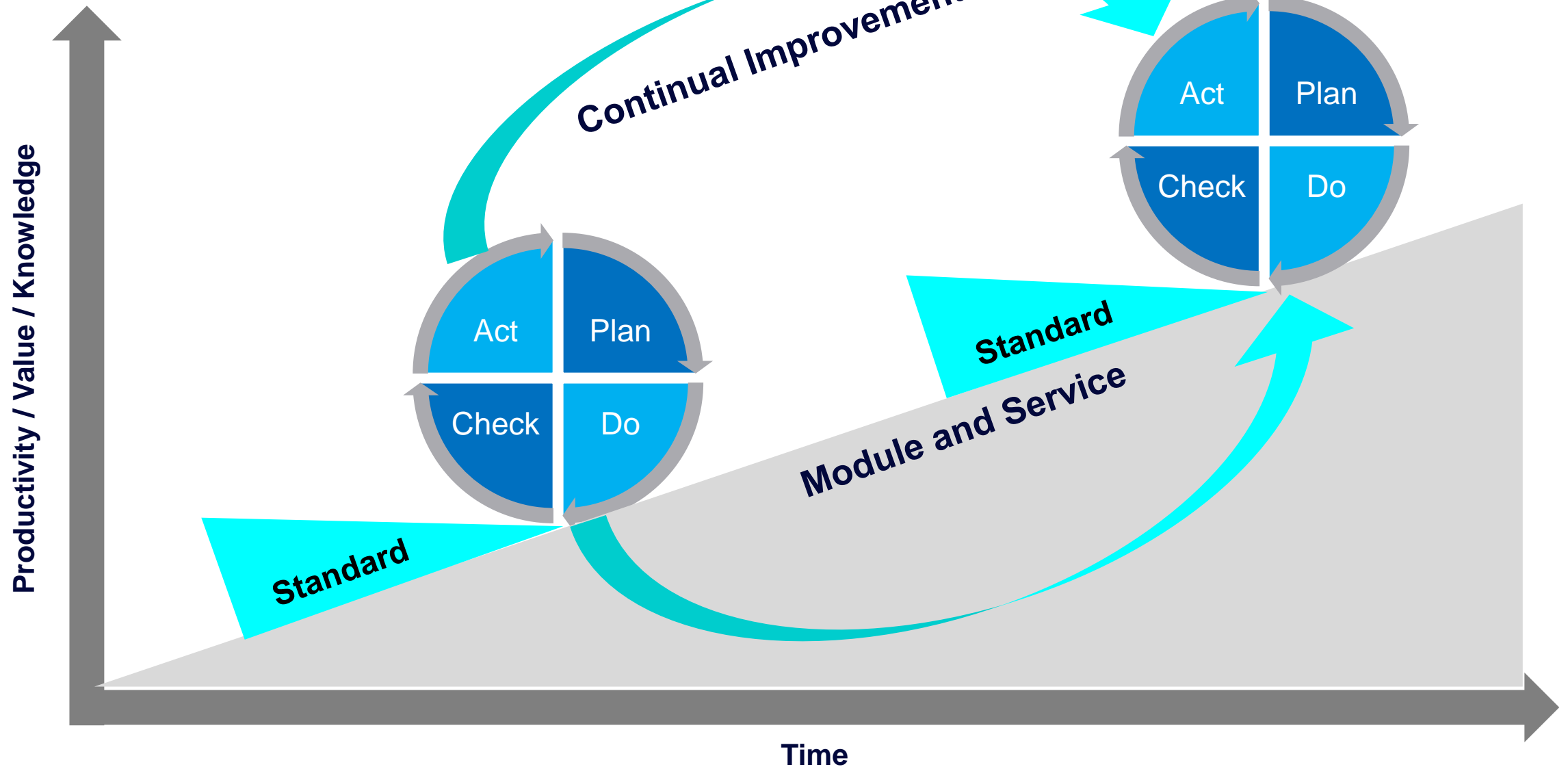Engage the business
Generate statistical data



Write report and affirm understanding
Create recommendations

Meet business
Review processes and usage

# Continuous Continual Improvement

| Year 1 | Year 2 | Year 3 |
|--------|--------|--------|
| SEND | Early Years | Grants & Benefits |
| CSS | Admissions | Transport |
| B2B | Youth Service | Exclusions |

# Continual Improvement Profile



Productivity / Value / Knowledge

Continual Improvement

Act | Plan

Check | Do

Standard

Module and Service

Standard

Act | Plan

Check | Do
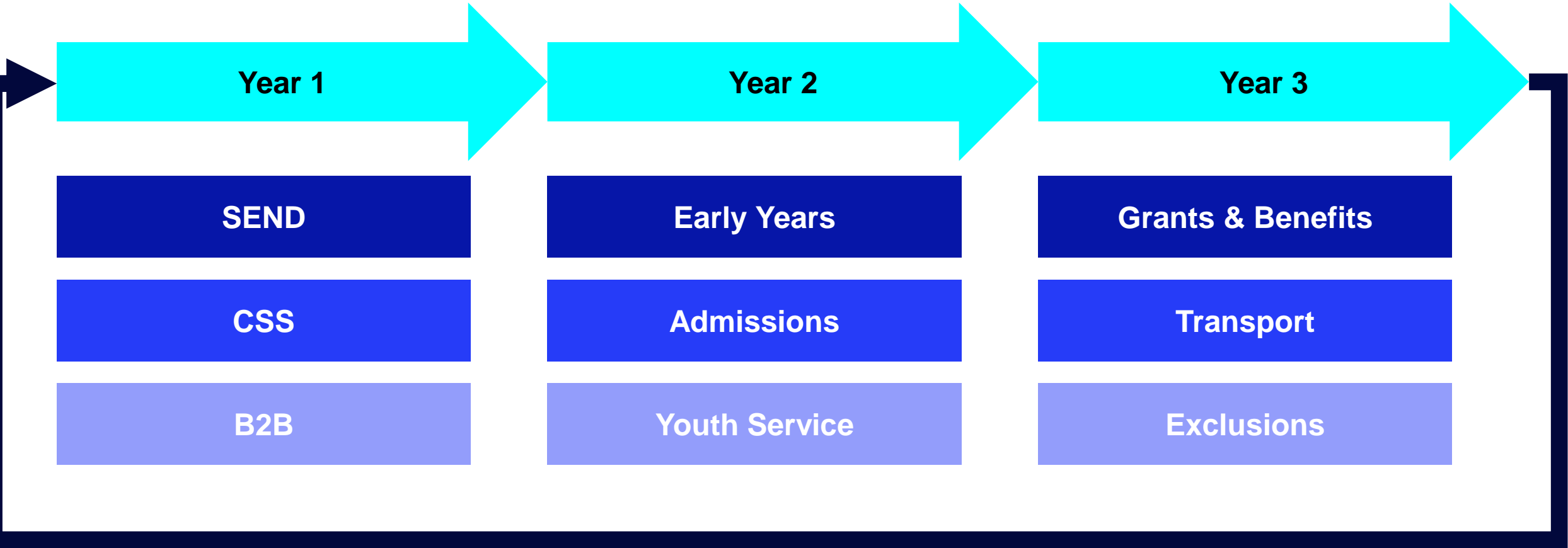
Time

# Best Practice Review

- **Analysis of current usage**

- **Report clearly identifying recommendations**
  - RAG Rated
  - What can be achieved with no further investment
  - How you can get the most from your existing investment
  - The art of the possible

- **A tool you can use to engage with your stakeholders**

- **Evidence of your organisations commitment to continual improvement to external bodies such as Ofsted, ISO: 9001 Quality Management auditors, Estyn and HMIP**

# Benefits to You

| Outcome | Benefit |
|---|---|
| Better user experience | Better user adoption<br>More accurate recording<br>End user time savings |
| Bringing external recording into the system | More accurate data<br>Ability to report in real time<br>Better service level reporting informing operational decisions |
| Greater visibility of the child across services | Better customer experience, not being repeatedly asked for the same information<br>Time savings establishing facts<br>Better cross LA reporting informing strategic decisions |
| Time efficiency savings | Reducing the administration overhead to staff<br>Freeing staff time for customer engagement |
| Access to an industry expert | Ability to draw in best practice experience from other LAs |

03

Next Steps

## Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

Capita

Thank you

# Q&A

**Any questions?**

![Capita logo]

Capita One
EXPO 2022

**Admissions
& Transfers
Support
Solution (ATSS)**

# Welcome & Introductions

Your speaker:
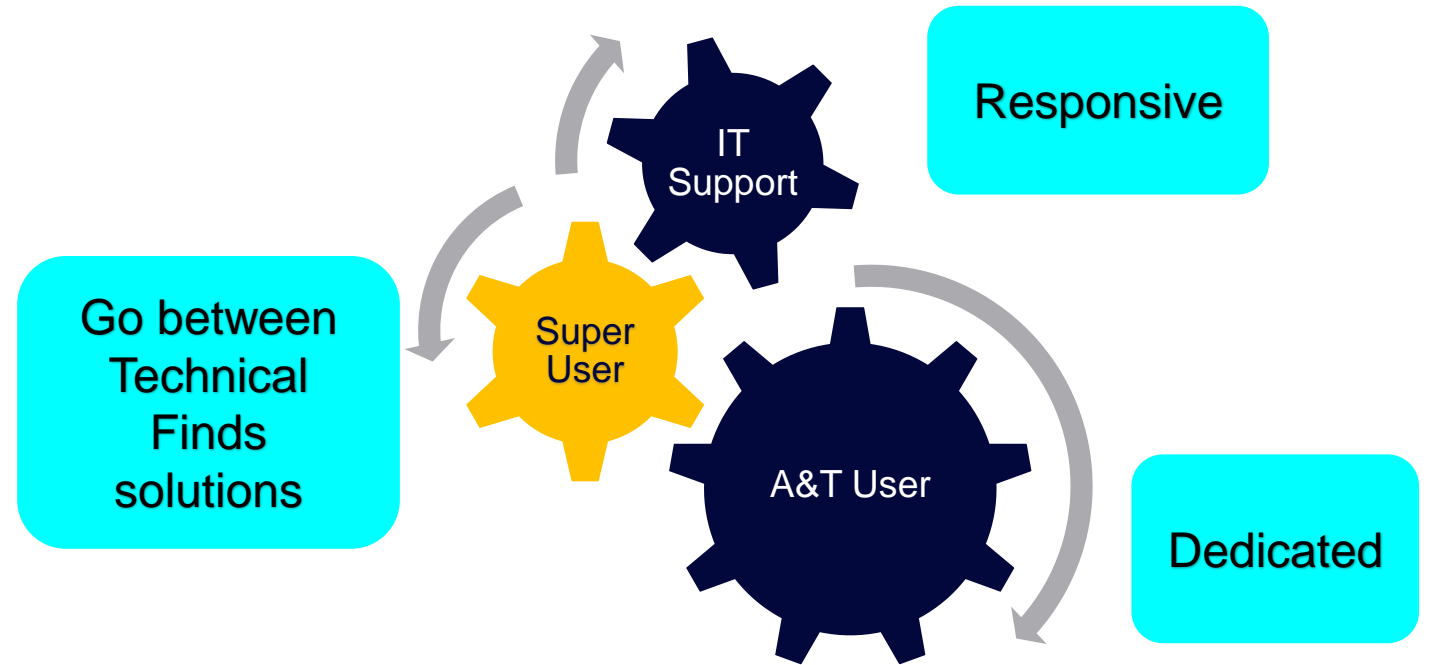


Karen Orman

Senior Knowledge Specialist

# Agenda

1. Background
2. Our Solution
3. Customer Experience
4. Next Steps

**01**

**Background**

## Capita One Admissions

**Admissions is a high jeopardy service.**

The success of the Admissions service impacts on all parents with children at some point. From starting school, transition to the next phase of education, and supporting parents to find a school.

If it fails, faulters, you hit the headlines!

# How to support A&T?

Go between
Technical
Finds
solutions

Super User

IT Support

A&T User

Responsive

Dedicated
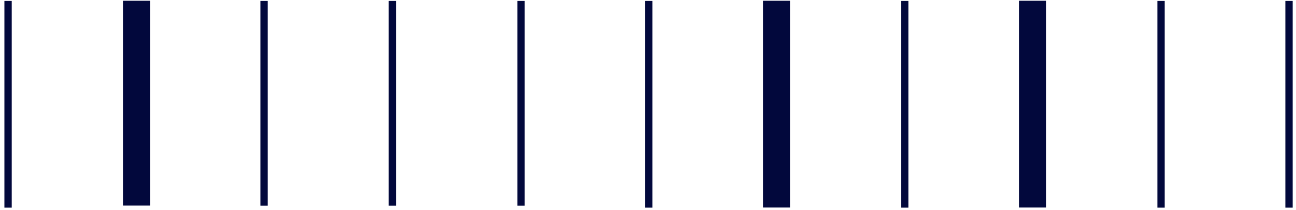
# Ring any bells?

**Does A&T need a lot of support?**

One Support: Would you prefer to be focusing on other areas?

Has there been a loss of key knowledge in the team, or new starters who need support?

Has the support arrangements changed?

**Best value?**

Over time, have work arounds become the norm?

Is there duplication of effort in maintaining spreadsheets?

Has knowledge been inherited?

**Using all the portals?**

Using the Schools Portal?

Is the Citizens Portal being used for In-Year?

Are you using the Citizen Portal in the most effective way for parents?

**Reports?**

Do you have a 'mine' of Crystal reports?

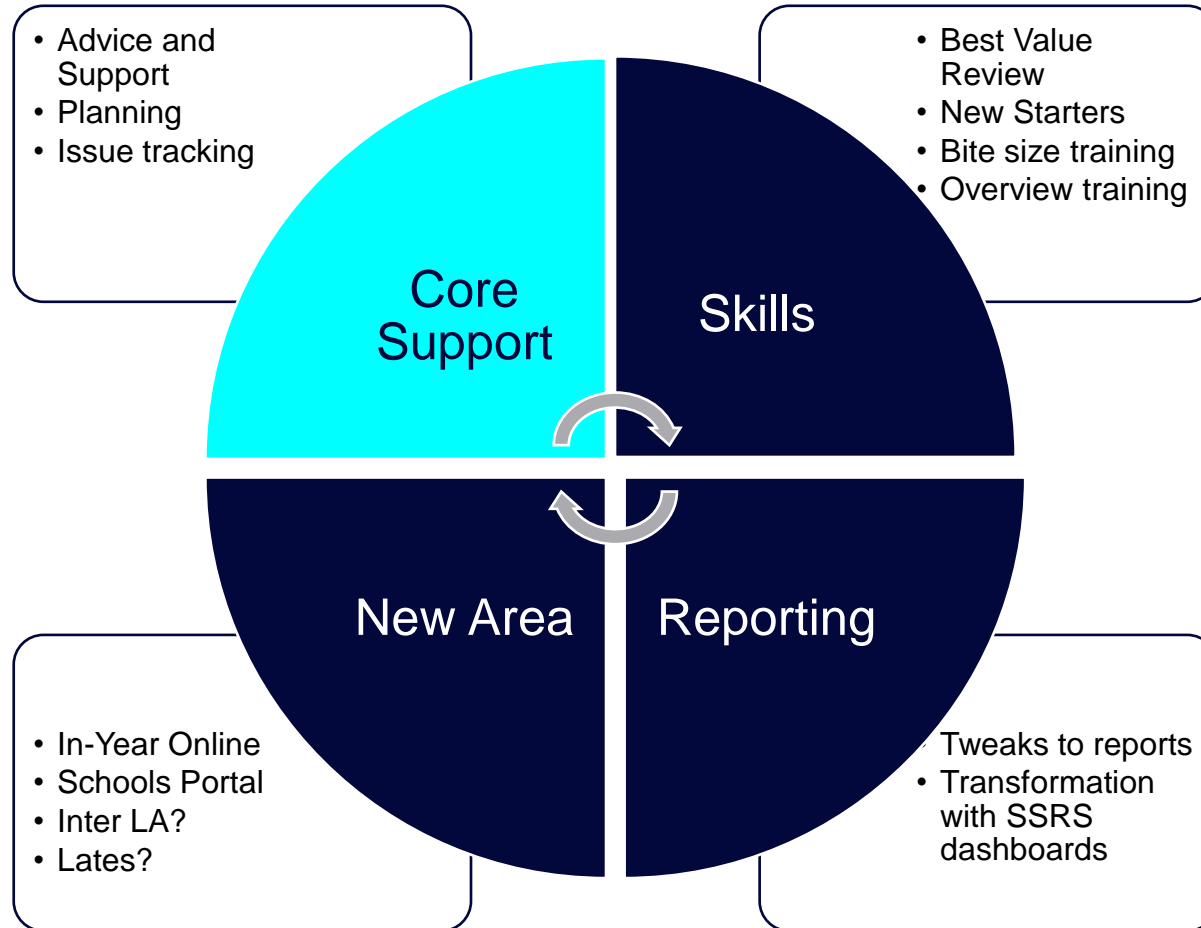Are you using reporting to highlight applications that need validation?

Tracking In-Year Applications against performance indicators?

# 02

## Our Solution

# ATSS Solution

- Advice and Support
- Planning
- Issue tracking

- Best Value Review
- New Starters
- Bite size training
- Overview training

Core Support

Skills

New Area

Reporting

- In-Year Online
- Schools Portal
- Inter LA?
- Lates?

- Tweaks to reports
- Transformation with SSRS dashboards

## Core Support

- Direct contact with A&T Knowledge expert
- Email address dedicated to support
- Regular catch-up meetings throughout the year
- Issue triage
- Planning to keep to deadlines

# Core Support

- Quick access to an Admission expert who understands your Admissions process **– Save time Searching help and knowledge bank**

- Solutions for issues, circumstances change, we will find and advise on how to work through challenges **– We review the impact, and share good practice**

- Health checks on setup, and readiness to publish offers **– Good setup, good data are the key to success**

- Collaborative working with your Admissions Team **– make us part of your admissions team**

# Skills

- Best value review of the current use of the module
- Bite size training for different audience of users
- Timely training
  - Overview
  - Module Admin
  - E-applications
  - Inter LA transfer
  - New users
  - GIS, etc.

# Skills

**What does this mean for you:**

- Best value review : **we understand how you should be using Admissions**

- Little and often training – **slots in with the busy demands of the business process**

- Training with sharing of **best practice of use of the software**

- Sign posting to training **support resources and sharing of 'How to guides'**

# Reports

- Tweaks to existing crystal reports

- Introduction of SSRS reporting dash boards that target data quality and support In-Year admissions

- Reporting for highlighting validation applications

# SSRS Dash-board



**Open Cases Tracker**

### Cases in Flight

| NCY | G | R | Total |
|---|---|---|---|
| 0 | 1 | 0 | 1 |
| 4 | 1 | 1 | 2 |
| 5 | 0 | 1 | 1 |
| 6 | 2 | 1 | 3 |
| 9 | 1 | 0 | 1 |
| **Total** | **5** | **3** | **8** |

### Monitor Cases

| APPLICATION STATUS | G | R | Total |
|---|---|---|---|
| A1-Pending | 5 | 1 | 6 |
| A2-On Hold - Missing Details | 0 | 1 | 1 |
| B1-Processing | 0 | 1 | 1 |
| C1-Monitor School Attendnace | 0 | 1 | 1 |
| **Total** | **5** | **4** | **9** |

Applications

E-Applications

| RAG | SURNAME | FORENAME | DOB | GENDER | STUD ID | NCY | PHASE | POSTCODE | APPLICATION STATUS | FORM RECEIVE DT | APP SUBMITTED DATE | SUBMIT STATUS |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| R | Belfast | Polly | 12-12-2012 | F | 8915428 | 4 | PRI | MK43 0NE | C1 | 19 Aug 2021 00:00:00 | 19 Aug 2021 11:23:56 | SubmittedForFirstTim |
| R | Wokingham | Polly | 01-09-2010 | F | 8915489 | 6 | PRI | MK41 6AS | HOLD | 06 Oct 2021 00:00:00 | 06 Oct 2021 15:03:30 | SubmittedForFirstTim |
| G | Abrams | Kim | 08-06-2013 | F | 8904454 | 4 | PRI | Z1 2AD | PEND | | | |
| G | Bbbam | Bara | 31-03-2011 | M | 8902145 | 6 | PRI | MK43 0NE | PEND | | | |
| G | Bender | Leon | 19-08-2011 | M | 8906716 | 6 | PRI | Z2 2CC | PEND | | | |
| R | Greenhalle | John | 31-12-2011 | M | 8915290 | 5 | PRI | MK43 0DR | PEND | 10 Aug 2021 00:00:00 | 10 Aug 2021 17:11:19 | SubmittedForFirstTim |
| G | õùøüûAAñNng?? | õùøüûAAñNng?? | 29-01-2017 | M | 8915068 | 0 | PRI | MK41 6AS | PEND | | | |
| R | Snail | Brian | 31-03-2013 | M | 8915291 | 4 | PRI | MK43 0DR | PROC | 26 Jul 2021 00:00:00 | 10 Aug 2021 17:20:13 | SubmittedForFirstTim |

# Reporting

- Quick turnaround for report tweaks **– We understand the tables and business process**

- Drill down reports using SSRS **– Dynamic drill down reports, stop relying on remembering school numbers**

- Transform reporting into SSRS **- quicker and integrate better with Excel**

- **Data quality drives the success of Admissions**

# Implementation

Use ATSS to implement one additional extension to Admissions

- Open up the Schools Portal to schools

or

- Citizen portal for In-Year

or

- SSRS Reporting

# Implementation

**What does this mean for you:**

- Get the best value from our service by wrapping in a implementation of new functionality.

- Introduction of new functionality within this extended package little and often training

# Meet the team





- **Karen Orman**

- **David Lloyd**

- **Mark Gabriels**

- **Adrian Alban**

## Your ATSS Partnership

**Tailored to your needs**

Invite us into you're Admissions Team

Get the best out of the module

Develop the admissions service

Improve the outcomes for families

# 03

## Customer Experience

# Customers

- Tameside
- Slough
- Darlington
- Worcestershire

# Feedback

The ATSS package has been an effective investment in School Admissions.  The support has been particularly useful at key dates in the  Admissions calendar to support the team to meet targets. It has provided a collaborative forum to embed existing skills and learn new ones.  Our "go to" Capita expert is both approachable and friendly with a willingness to solve problems at both strategic and processing levels.

Tameside

Karen was parachuted into the local authority (virtually of course) at short notice and had to acclimatise to the situation quickly. She lead them through the admissions process over a period of a couple of weeks ensuring that their systems were set up correctly and their data was of a sufficient quality to process over 2000 applications. Karen's input was absolutely pivotal in Slough Borough Council successfully notifying parents of their child's place at school and hitting their statutory deadline.

04

**Next Steps**

# Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

# Capita

**Thank you**

# Q&A

**Any questions?**

# Welcome & Introductions

Your speaker:



Duncan McMaster
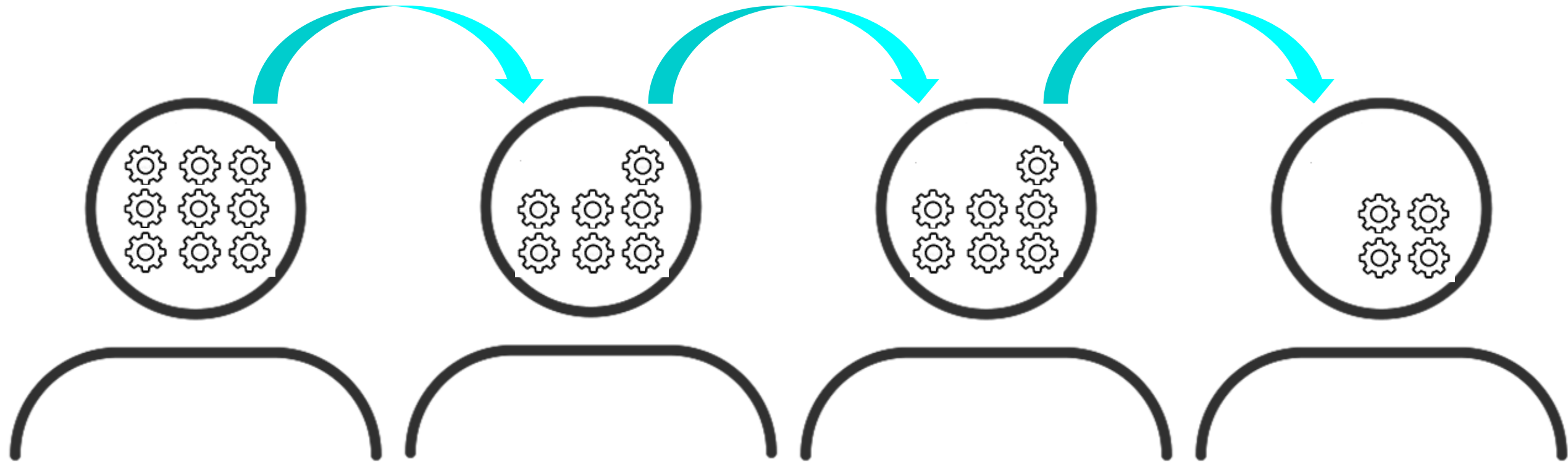
Head of Operations

Capita One Education

# Agenda

1. The challenge
2. How we can help
3. Next steps

01

The
Challenge
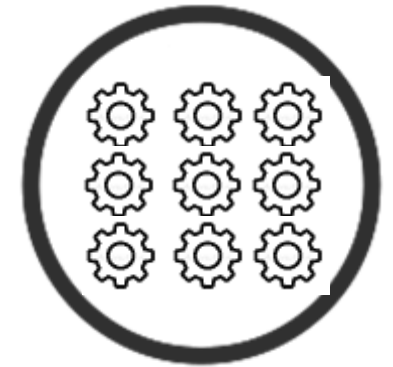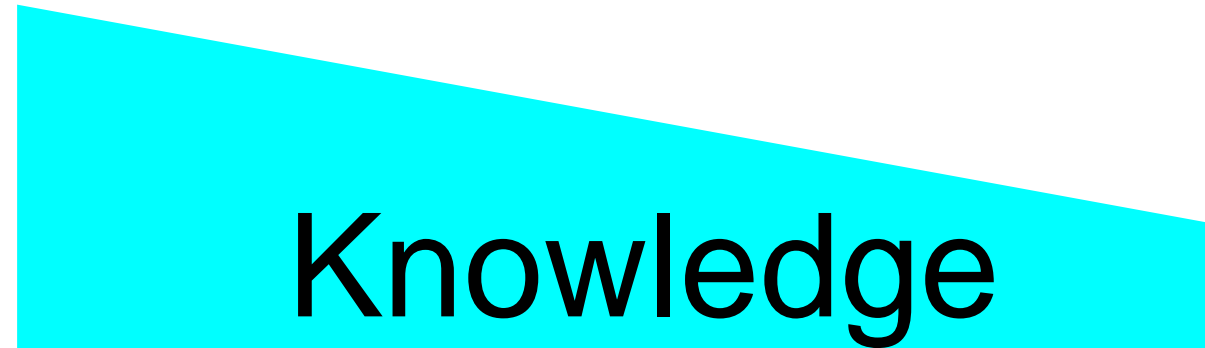
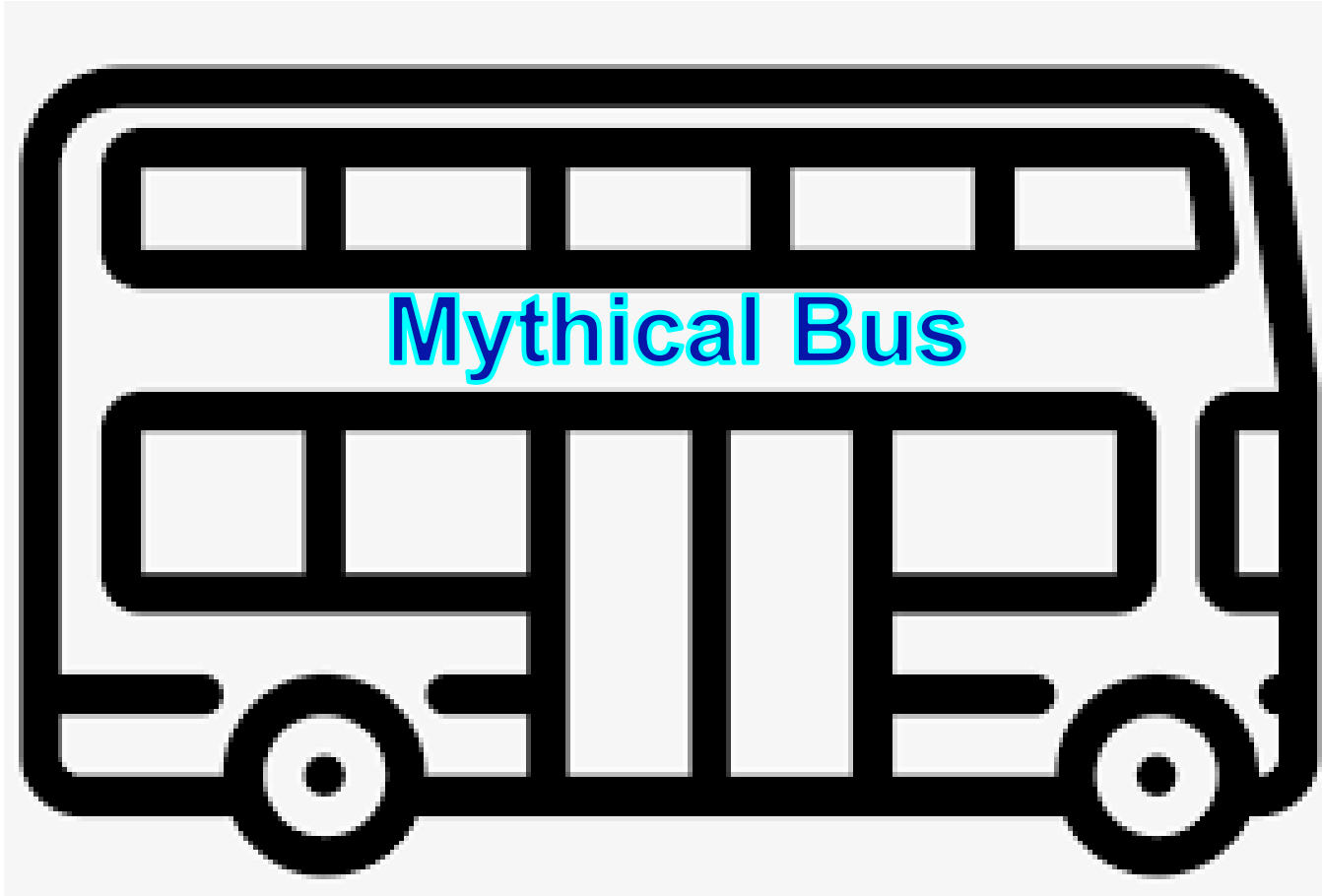# Dilution of Knowledge by Transfer

# Dilution of Knowledge by Time

**Training Received**

Time

Knowledge

**Training Implemented**

# Single Point of Failure



Mythical Bus

BANG

# New Starters

# The Challenge

Training delivered at the right time

Access to training

Ability to ask questions

Ability to ask questions from someone who knows your business
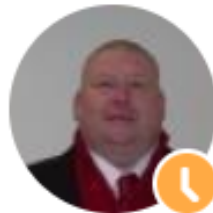
Keeping on top of new starters

Flexible

**02**

**How we can help**

# Capita Knowledge and Experience = 150+ Years

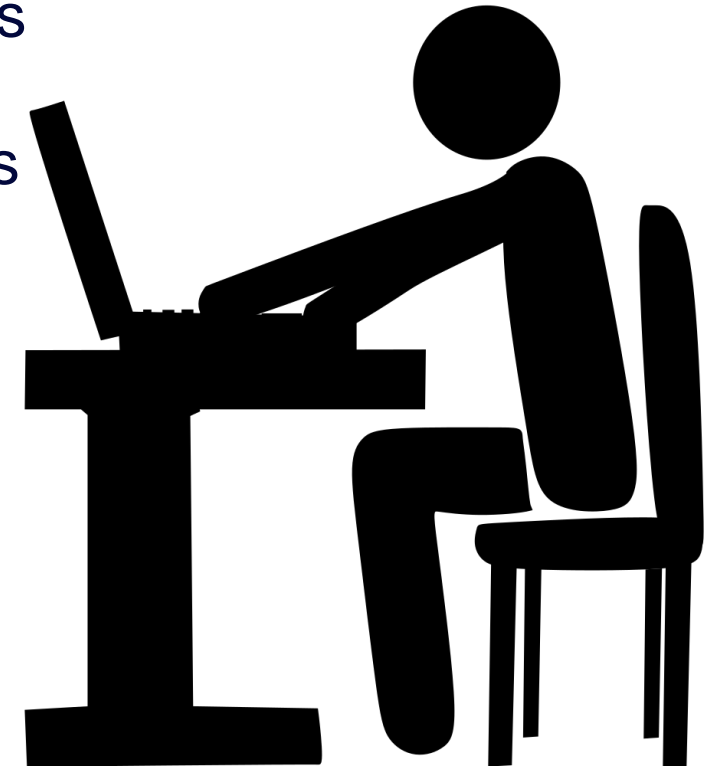# Not Just For System Administrators

Service and module specific courses

Courses aimed at One Coordinators

Courses aimed at service users

Refresher training

New user training

| Month | A&T | B2B | Early Year | G&B | IYSS | System | SEND | Transport | Youth Justice |
|---|---|---|---|---|---|---|---|---|---|
| January | Ask the Expert | | Pupil Premium Config | | | Creating a new CSS Service | Timelines and Quick Reports | | Intro to YJ part1 & 2 |
| February | | Ask the Expert | Headcount Admin | Ask the Expert | Ask the Expert | | | | Getting the best out of YJ |
| March | | | TYoF Admin | | Producing CCIS returns | Introduction to activities | Form Builder | Ask the Expert | Court allocations, Breaches |
| April | Ask the Expert | | Ask the Expert | | Intro to IYSS part 1 & 2 | | | Using bulk routines | Prevention cases |
| May | In Year, New user overview, End of phase processes | Scheduled tasks, New user training, Attainment Data | Pupil Premium Config | FSMs Workshop | September Guarantee | Address maintenance | Ask the Expert | Portal workshop | |
| June | End of phase processes, Transfer Group Setup | | Headcount Admin | FSMs Workshop, New User Training | | Introduction to activities | | Ticket bulk printing | Intro to YJ part1 & 2 |
| July | In Year Portal | New User / Refresher Training | TYoF Admin | Ask the Expert | Ask the Expert | | Timelines and Quick Reports | | Getting the Best out of YJ |
| August | Attainment | | Self Update | | | Improve Address management with WAV | | | Ask the Expert |
| September | Ask the Expert | Ask the Expert | School Based Providers | Ask the Expert | Bulk Updates and Imports | | Form Builder | Ask the Expert | |
| October | A&T Back Office | | Ask the Expert | | Assessments | Creating a new CSS Service | | | Ask the Expert |
| November | File Exchange Workshop | | Census | | Ask the Expert | | Ask the Expert | | |
| December | | Ask the Expert | Census | | | | | | |

# Why Subscribe to Remote Training

Delivered at a time that is right for you in easy to accommodate bite sized sessions
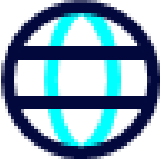
Delivered remotely to your workstation, wherever you are

Interactive delivery enabling you to ask questions and share screen

Industry expert lead, to ensure both product knowledge and best practice can be imparted

Rolling end user training

Flexible, if you cannot find the course you want, request an Ask the Expert session

# 97% of feedback was very good (83%) or good (14%)

Good explanations and could answer any queries with ease

Was able to answer all questions with ease and good knowledge

Insightful and ready to answer any questions with comprehensive answers

Mark has expert knowledge of EY product

Excellent knowledge and clear explanations given

Excellent knowledge and very fluently and clearly explained

**Trainer has outstanding knowledge**

As a former user had in depth knowledge

Simons Knowledge of SEN, Statutory requirements, was very good

David knows SEND very well and is always up to speed with what is happening

The trainer delivered exactly to the brief and had excellent knowledge of our business area

03

**Next Steps**

## Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

Capita

Thank you

# Q&A

**Any questions?**

# Capita

## Capita One EXPO 2022

## Bulk Day Purchasing

# Welcome & Introductions

Your speaker:



Duncan McMaster

Head of Operations

Capita One Education

# Agenda

1. The challenge
2. How we can help
3. Next steps

01

The
Challenge

## The Challenge

- Budget

- Time constraints

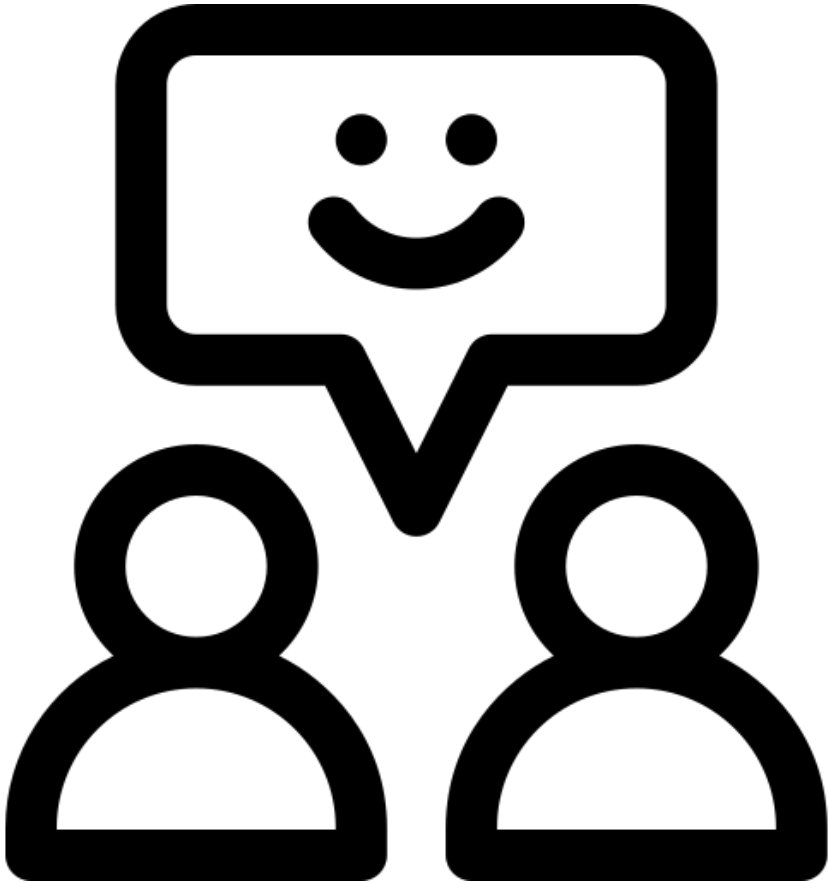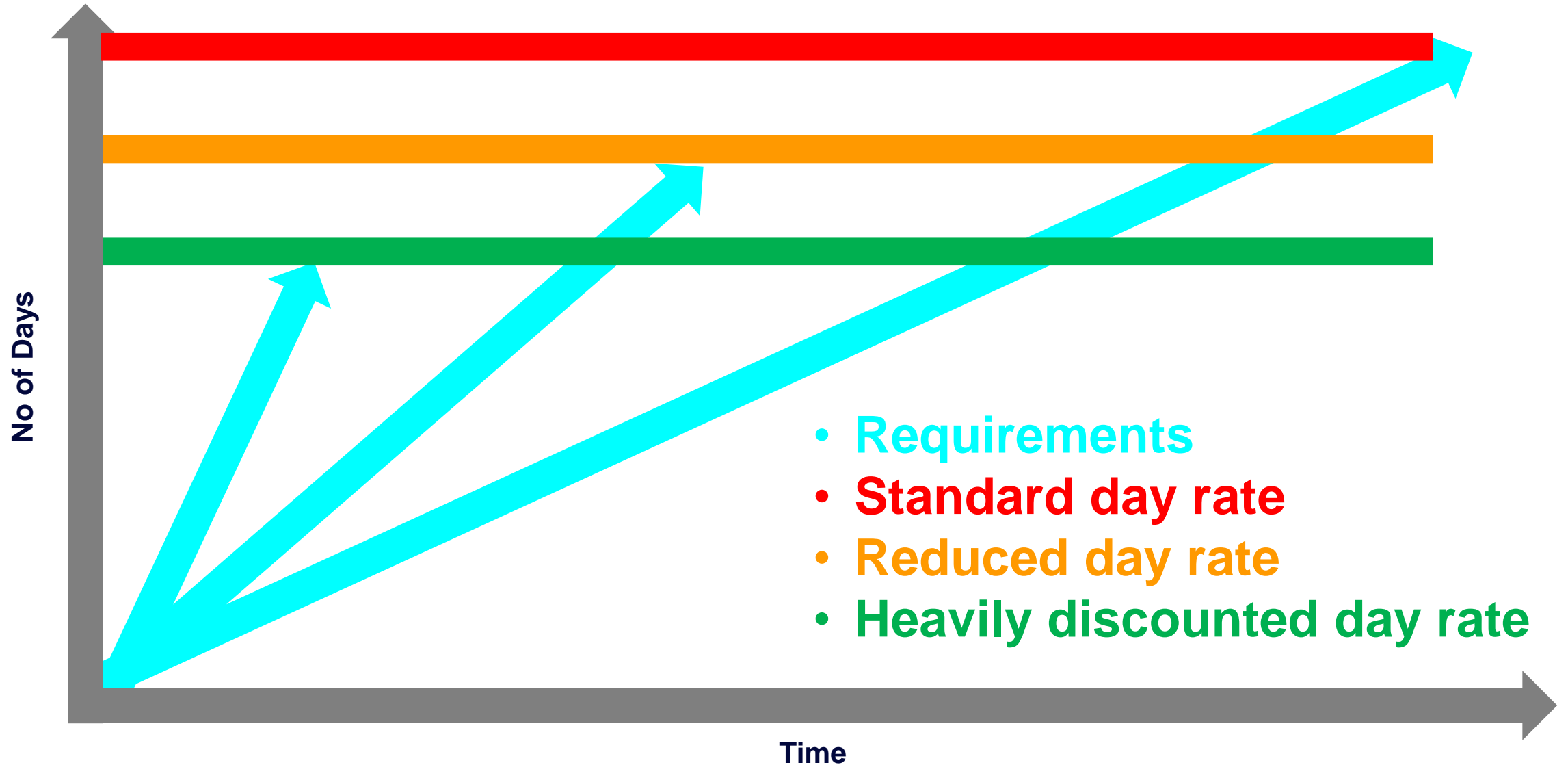- Business case

- Don't know exact details

**02**

**How we can help**

# Talk to us

- **Help us understand your plans and aspirations**

- **Help us understand your constraints**

- **Let us know how we can help**

# Payment Profile



- **Requirements**
- **Standard day rate**
- **Reduced day rate**
- **Heavily discounted day rate**

No of Days

Time

**03**

**Next Steps**

## Next Steps

If you would like to hear more on availability and costs, then please contact your Account Manager.

Capita

Thank you

# Q&A

**Any questions?**

## Additional Information

For more information on any of our products and/or services, please contact your account manager:

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Product brochures and customer case studies are also available on our website: https://www.capita-one.co.uk/product-and-services/one-education-and-childrens-services/youth-solutions

# Prize Draw Winner

By registering and attending this event one of you will be randomly selected and given a free day of Professional Services consultancy… the lucky winner will be contacted after the event.

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**Thank you**