

Capita



Provider Portal – Admissions Schools Refresher

Professional Services

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Introduction

The landscape is changing from maintained schools to own admissions authority schools. The Portal for School Admissions engages schools with the admissions process. No two customers approach using the Schools Portal in the same way. The level of engagement with schools via service level agreements varies from customer to customer. What you may have implemented as recently as the last round of admissions may need to change. So, if you want to get the best out of the module this refresher is for you.

The Portal for Admissions and Transfers is a powerful extension to the core A&T Module providing a convenient online self-service portal for all school applications across your authority. It simplifies the whole process, empowering schools by allowing access to applications, updating ranks and having a real time view of offers.

- **Significant time savings:** allow Own Admission Authority schools to rank their own applications updating the BackOffice module automatically. This removes the requirement for sending spreadsheets to schools, manually entering the ranks back into One, or sending ADT files to SIMS.
- With permissions, schools can be given access to view applications for Phase and In-year Transfer Groups. This **reduces the requirement** for reporting and sending data to schools in order to share this information.
- **Share the burden** with schools to verify siblings, by allowing a school to view and verify the sibling details for applications
- View lists of applications made. Enabling schools to encourage parents who have not yet applied, to do so.
- Schools can **view the latest waiting lists** and review the latest Allocations and changes in real time. Making the data transfer process efficient and secure.
- Schools can download ATF files for allocated children. Then import into their schools management system
- Control what schools can do if you have different schools with different service level agreements

Benefits

This refresher provides your admissions team with an opportunity to review if they are getting the best use out of the module. It is an opportunity to:

- Train new staff, and staff with inherited knowledge
- Review best practice used by other admissions teams to maximise applications and minimise the need to contact parents for clarifications
- Provide training so you can confidently test, support parents
- Help to set the live environment up so you are ready for parents to apply online, and feel confident that you can maintain and adapt to challenges parents present
- Test new features and opportunities the product offers

Pre-requisites

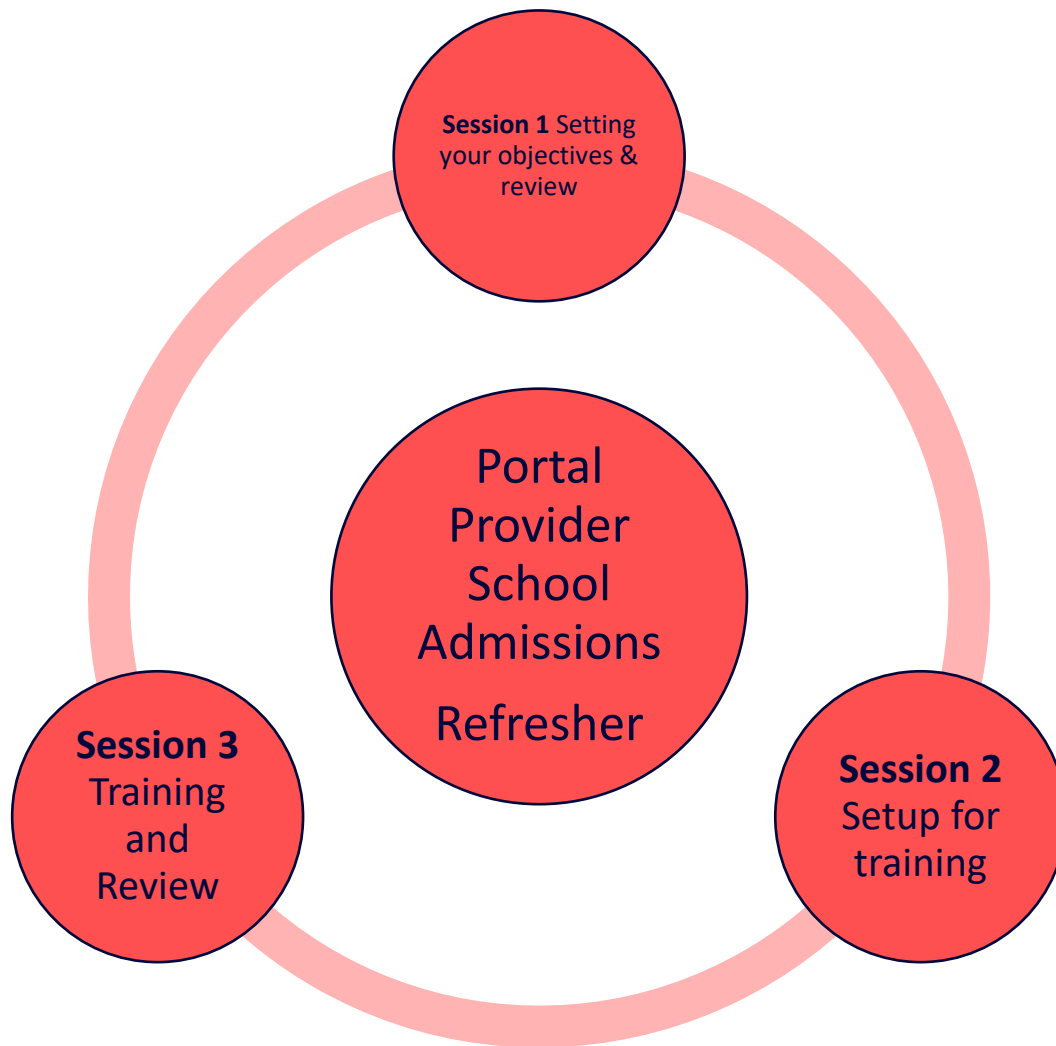
To enable us to provide a quality service, the following is required from the Local Authority:

- Have the A&T Backoffice, Bases module and Provider Portal for School Places
- Started using the Provider Portal for School Places
- Access to participate in Microsoft Teams and or Webex sessions for support and configuration by the knowledge specialist
- One database at the current version or previous version
- Email service for One configured for One
- File upload configure for One
- Appropriate access to all One Clients for the Knowledge Specialist

Service Overview

Capita will assist, revisit, and review your use Citizen Portal for In-Year Schools Admissions by providing the following:

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Capita believe in a strong emphasis on a proactive partnership with the customer. The Capita Project Coordinator will work closely with the customer’s appointed Project Lead throughout the project to achieve this. The Capita Project Coordinator is the coordinating Capita staff member assigned to the project and is therefore able to respond authoritatively to the needs of the project and will actively and continually monitor progress on all risks, issues, actions, and decision in order to ensure successful delivery.

Service Details

Session 1(Remote): Refresher Scoping

<p>Key Prerequisites (full list provided in RAID log)</p>	<ul style="list-style-type: none"> • Location for a meeting with access to screen • Access to a workstation with full access to One Test, with system admin rights for V4 Client, A&T Backoffice and the Citizen Portal • Test is recent copy of live
<p>Objectives</p>	<ul style="list-style-type: none"> • Review how you are using the Provider Portal for School Places • Understand the challenges you face • Agree what your training objectives are and what the training should focus on
<p>Audience</p>	<ul style="list-style-type: none"> • Admissions Managers to understand their service needs • One Support – impact on One and reporting and support
<p>Standard Agenda</p>	<ul style="list-style-type: none"> • Review the schools experience via the Test system • Local challenges – schools and applications • Review the requirements how the Admissions and Transfer Process (End of Phase, e.g. Primary to Secondary) and In-year • Agree training agenda for on-site sessions
<p>Outcomes</p>	<ul style="list-style-type: none"> • All parties have a mutual understanding of what they want to achieve from the work package

Session 2(Remote): Configuration of Test

<p>Key Prerequisites (full list provided in RAID log)</p>	<ul style="list-style-type: none"> • Key contact for the Knowledge Specialist to contact who has full systems access to the One V4 Client, Online Client, and access to Crystal or permissions to run reports • Key contact has can participate in MS Teams, and Webex meetings
<p>Objectives</p>	<ul style="list-style-type: none"> • Set up the Test Environment • Skim test it works form Parent application to import into the ONE
<p>Audience</p>	<ul style="list-style-type: none"> • One coordinator or Key contact with full access to One • Admissions team lead be available for any key questions
<p>Standard Agenda</p>	<ul style="list-style-type: none"> • Configure A&T Backoffice and Bases, copying transfer groups • Setup features not used currently that are needed for training • Configure the Portal for School Places • Skim test – Registration, Application, Process in the Back Office
<p>Outcomes</p>	<ul style="list-style-type: none"> • Test system is working end to end, ready for training

Session 3(Onsite): User Training

<p>Key Prerequisites (full list provided in RAID log)</p>	<ul style="list-style-type: none"> • Key contact for the Knowledge Specialist to contact who has full systems access to the One V4 Client, Online Client • Venue for session and users have access to Test for both the A&T BackOffice, Provider Portal and emails. • If emails are not active in test users will be required to register as parents prior to the session to allow for accounts to be activated, users may also prefer to use a non-work email account to test access from outside the office.
<p>Objectives</p>	<ul style="list-style-type: none"> • Understand the schools experience • Know how the schools may process applications • Have a clear view of what they want to adopt in their live environment • Understand how to apply changes to the live environment
<p>Audience</p>	<ul style="list-style-type: none"> • One coordinator or Key contact with full access to One • Admissions team
<p>Standard Agenda</p>	<ul style="list-style-type: none"> • Viewing applications • Updating ranks • Validation of Siblings • Viewing Offers • Downloading data • ATF files • Hiding schools and features • Uploading changes • Reporting • School updates and
<p>Outcomes</p>	<ul style="list-style-type: none"> • The admissions team are confident to apply to live

	<ul style="list-style-type: none">• Feel confident to invite other colleagues to make parent applications
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Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
<p>Reporting (Off Site) Adapting reports to support local needs</p> <p>Benefits Importing data from the general public needs checking and review, we have extensive experience in this area, but every customer is different.</p> <p>In-Year - offers new challenges for tracking applications made my parents and importing into the One. Based on good practice from other customers are template reports and letters for In-Year give you're the additional tools for monitoring, liaising with schools and production of management Information</p> <p>Working with the team we a quick provide a set of up to 10 reports that will underpin the implementation</p> <p>Cost:</p>	<p>6</p>	<p>One Administrator Admission Manager</p>