![Capita logo]

Citizen Portal – Admissions and Transfers – Implementation Package

Professional Services

Copyright

Contact Capita

Contact your account manager or simon.pixley@capita.com for further details relating to this.

Contents

Introduction

Managing school places is never an easy task, not least because the process can involve complex parental enquiries, where detailed knowledge of each application is crucial.

The Citizen 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 parents and carers by giving them access to what they need.

Benefits

Because the portal is accessed by families and the back-office elements of One Admissions & Transfers are fully integrated, there's no need for local authority admissions teams to manually add applications, streamlining the management of admissions. With a detailed, easily referenceable history to hand, teams also have all the information they need to manage admissions enquiries, validation and offers, more efficiently and freeing up resources to be invested where they will have the greatest impact.

This work package will provide your admissions team with a streamlined project to work to efficiently implement this powerful addition to the A&T Backoffice module.

We will support and guide you from beginning to your first offers being made to parents; sharing good practice from different Local Authorities: working in partnership so you get the most out of the module and can offer a good service to your parents.

- We will start by listening and understanding your local admissions challenges so we appreciate how you can get the best out of the software

- Scoping your requirements to configure your Test environment to suit your needs to support including, customisation of text, UAT testing, to going live with confidence

- Configure your test system to support training and your own user acceptance testing, so you have a smooth experience

- Provide training so you can confidently test, and build you experience of how the integration of this public facing application works with your admissions processes

- 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

- Finally, we don't abandon you once you go live, we follow up to review how you are managing importing applications and readiness to publish offers

Pre-requisites

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

- Have the A&T Backoffice, and Bases module

- Install the licence key into test and do an IIreset before Session 1

- Remote access for One Technical to install and configure web components

- 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

- Have a test environment that has been refreshed withing the last academic year

- 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 in the successful implementation of the Citizen Portal for Schools Admissions by providing the following:

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: Project Launch

Key Prerequisites (full list provided in RAID log)	• Access to a workstation with full access to One Test, with system admin rights for V4 Client, A&T Backoffice and the Citizen Portal
Objectives	• Review the scope of the software and for all parties to understand how they will benefit, and what the challenges maybe • Identify time and resources needed to support the implementation
Audience	• IT Support – to check and review Technical environment • Admissions Managers to understand their service needs • One Support – impact on One and reporting and support
Standard Agenda	• Demonstrate the module for a Parent, and integration with the back-office • Review the RAID log and Technical Pre-requisites, allowing for IT support to understand how The Citizen Portal integrates if this is the first module to be used in the Citizen Portal • Review the requirements how the Admissions and Transfer Process (End of Phase, e.g. Primary to Secondary) • Test access to the Test environment to check for any missing configuration that will delay successful set up of the Test environment.
Outcomes	• All parties have a mutual understanding of the scope of the software, the service requirements, and resources needed • Test environment is ready for setup and configuration

Session 2: Configuration of Test

Key Prerequisites (full list provided in RAID log)	• 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
Objectives	• Set up the Test Environment • Skim test it works form Parent application to import into the ONE
Audience	• One coordinator or Key contact with full access to One • Admissions team lead be available for any key questions • IT support be available to contact for IIsrests if required
Standard Agenda	• Configure A&T Backoffice and Bases • Configure the Citizen Portal for School Places • Skim test – Registration, Application, Process in the Back Office
Outcomes	• Test system is working end to end, ready for training

Session 3: User Training for UAT

Key Prerequisites (full list provided in RAID log)	• 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 • Users have access to Test for both the A&T BackOffice, Citizen Portal and emails. • If emails are not active in test users will been to register as parents prior to the session to allow for accounts to be activated, users may also prefer to you're a non-work email account to test access from outside the office. •
Objectives	• Understand the parents experience • Know how to match and process applications • Have a clear view of what they want to Test during acceptance testing •
Audience	• One coordinator or Key contact with full access to One • Admissions team •
Standard Agenda	• Registration and orientation within the Citizen Portal • Making an application • Matching and importing – how it works and behaviours • Finding and manging parent enquires • Offers to parents •

Outcomes	• The admissions team are confident to test
	• Feel confident to invite other colleagues to make parent applications
	• Commit to testing
	•

Session 4: User acceptance review

Key Prerequisites (full list provided in RAID log)	• 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 • Able participate in MS Teams, and Webex meetings • Have a log of queries ready for the meeting
Objectives	• Review the UAT log • Confirm and agree text changes to the Live environment
Audience	• One coordinator or Key contact with full access to One • Admissions team
Standard Agenda	• Registration and orientation within the Citizen Portal • Making an application • Matching and importing – how it works and behaviours • Finding and manging parent enquires • Offers to parents • Check Technical Pre-requites for Live
Outcomes	• The admissions team are confident to go live

Session 5: Configuration of Live

Key Prerequisites (full list provided in RAID log)	• 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
Objectives	• Set up the Live Environment • Skim test it works form Parent application to import into the ONE
Audience	• One coordinator or Key contact with full access to One • Admissions team lead be available for any key questions • IT support be available to contact for IIreset if required
Standard Agenda	• Configure A&T Backoffice and Bases • Configure the Citizen Portal for School Places • Skim test – Registration, Application, Process in the Back Office
Outcomes	• Live system is working end to end, ready for the public. Note once setup the Module can be switch off, until the official launch.

Session 6: Post Go Live Applications

Key Prerequisites (full list provided in RAID log)	• 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 • Able participate in MS Teams, and Webex meetings
Objectives	• Review applications made by the public • Answer any queries the Admissions team for supporting parents
Audience	• One coordinator or Key contact with full access to One • Admissions team
Standard Agenda	• E-applications and enquiries • Matching and processing conflicts • Checking for anomalies • Validation of E-applications
Outcomes	• The admissions team are confident they are handling applications correctly

Session 7: Post Go Live Offers

Key Prerequisites (full list provided in RAID log)	• 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 • Able participate in MS Teams, and Webex meetings
Objectives	• Check readiness to publish Offers • Answer any queries the Admissions team for supporting parents • Review what parents are going to have access to on Offer day
Audience	• One coordinator or Key contact with full access to One • Admissions team
Standard Agenda	• E-applications and enquiries • Technical Setup for Offers • Text parents will see • Import of acceptances (if using)
Outcomes	• Parents will get the offers on the National Offer day

Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
Reporting (Off Site) Adapting reports to support local needs **Benefits** Importing data from the general public needs checking and review, we have extensive experience in this area, but every customer is different. Working with the team we a quick provide a set of up to 10 reports that will underpin the implementation **Cost:**	6	One Administrator Admission Manager
Portal – Citizen In-Year (Off Site & Onsite) Adapting software to manage phase and In-year phase applications **Benefits** **Cost:**		
Portal – Citizen Late's (Off Site & Onsite) Adapting software to manage phase and In-year phase applications **Benefits** **Cost:**		