



# Citizen Portal Transport - Implementation Package

Professional Services



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## Contact

Contact your account manager or [simon.pixley@mrisoftware.com](mailto:simon.pixley@mrisoftware.com) for further details relating to this.

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# Introduction

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This document outlines MRI Education's approach in supporting Local Authorities implement the Citizen Portal to allow for more efficiently managing the Transport application process for both the parent and the Local Authority.

# Benefits

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The key benefits of implementing the Transport Portal are:-

- One communication method for parents and Local Authorities.
- Parents able to apply quickly and easily for home to school travel for their child(ren).
- Results of assessments shared directly with parents.
- A totally customisable online interface allows LA the flexibility to ask specific questions relevant to home to school travel.



## Citizen Portal for Parents

### Online application

Automatic import of application ready for processing, no requirement to re-key

Parents receive email notification of progress and outcome; reduced number of enquiries

Can include links to other web pages/policies; cost savings as no requirement to post information about appeals/next steps

# Pre-requisites

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Customers wishes to implement Transport V4 should have the following pre-requisites:-

- Transport V4 module is live within the LA
- At least one other module within the Citizen Portal suite is live and users are familiar with the Portal System Administration
- Bases V4 is live within the LA
- B2B Student is live within the LA

[Additional Service Packages](#) can be purchased to meet these pre-requisites if not currently available.

# Service Overview

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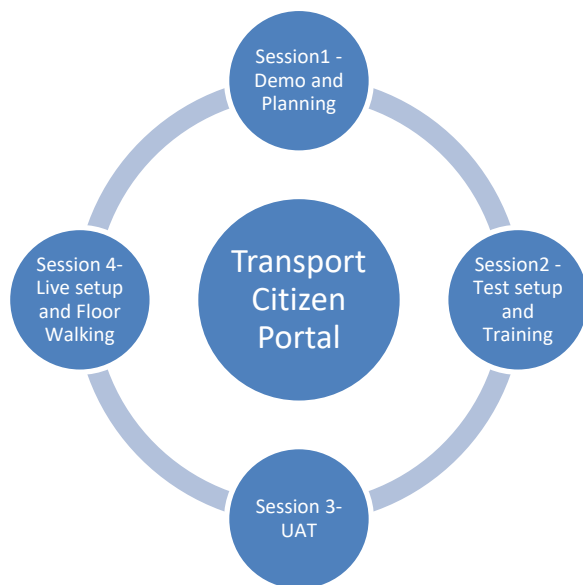
The Implementation package is described in the table below.

| Element                                             | Days | Description                                                                                                                                             |
|-----------------------------------------------------|------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Planning Session                                    | 1    | The Knowledge Specialist will provide a full system demonstration and overview of the Transport Citizen Portal.                                         |
| Test Set-up and Training                            | 1    | The Knowledge Specialist will set-up and establish a TEST environment for the LA which will reflect the LA's business process requirements.             |
| User Acceptance Testing (UAT)                       | 1    | The Local Authority will test the set-up with sample applications to ensure the portal conforms to expectations and requirements.                       |
| Live Set-up and Floor Walking / Additional Training | 1    | The Knowledge Specialist will provide LIVE system configuration of the Transport Portal and will provide any additional training / support as required. |

We believe in a strong emphasis on a proactive partnership with the customer. This implementation approach will involve a MRI Education Project Lead who will work closely with the customer's appointed Project Lead.

The MRI Education Project Lead can respond authoritatively to the needs of the project and will actively and continually monitor progress on all risks, actions, issues, and decisions to ensure successful delivery.

A Knowledge Specialist will be assigned to this project who will attend on-site to assist and guide customers through every stage of the implementation process and make recommendations on any service improvements that may be considered relevant.



# Service Details

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## Session 1: Demo and Planning Session

|                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Objectives</b>      | <ul style="list-style-type: none"><li>• To provide a full system demonstration and overview of the Transport Citizen Portal</li><li>• To establish the current use of Transport within the LA in respect of Home to School Transport applications so that consideration can be given to the set-up required for the Transport Portal.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Audience</b>        | <ul style="list-style-type: none"><li>• MRI Education Co-ordinator and current Transport team members who will be processing Home to School Transport Applications.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Standard Agenda</b> | <ul style="list-style-type: none"><li>• Introductions</li><li>• Purpose of today and expectations</li><li>• Review and discussion around current working practices</li><li>• Demonstration of Transport Citizen portal to include:-<ul style="list-style-type: none"><li>• How parents register with the portal</li><li>• How parents submit on-line applications</li><li>• How applications are matched and processed within the back-office environments(s)</li><li>• How parents are informed of the outcome of their application.</li></ul></li><li>• Discussion and questions around implementation approach and timescales for the project</li><li>• Discussion around pre-set and additional question configuration.</li><li>• Discussion around on-line text configuration to ensure it meets with the LA's policies, procedures and guidelines.</li><li>• Any further questions</li><li>• Conclusion and summarise next steps.</li></ul> |

|                 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Outcomes</b> | <ul style="list-style-type: none"> <li>• Users will understand how the Transport Citizen portal operates from both a parental perspective and back office processing.</li> <li>• The LA will appreciate how the Transport Citizen portal will greatly benefit them in the processing of Home to School Transport applications.</li> <li>• The Knowledge Specialist will have the information to establish the TEST environment and to set-up the configuration to best suit the LA.</li> <li>• Everyone understands timescales and project implementation approach.</li> </ul> |
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## Session 2: TEST Set-up and Training

|                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Key Prerequisites</b><br>(full list provided in RAID log) | <ul style="list-style-type: none"> <li>• Transport V4 is Live within the LA</li> <li>• Bases V4 is Live within the LA</li> <li>• B2B Student is Live within the LA</li> <li>• At least one other module within the Citizen Portal suite is Live and Users are familiar with the Portal System Administration</li> <li>• Access to the TEST database.</li> <li>• Internal I.T. on hand to assist with any issues.</li> </ul>                                                                                        |
| <b>Objectives</b>                                            | <ul style="list-style-type: none"> <li>• To establish a TEST environment for the Transport Citizen Portal to enable users to fully test the system from both a parental and LA perspective.</li> </ul>                                                                                                                                                                                                                                                                                                             |
| <b>Audience</b>                                              | <ul style="list-style-type: none"> <li>• MRI Education Co-ordinator responsible for Portal applications.</li> <li>• Transport Team members who will be dealing with Home to School Transport requests.</li> </ul>                                                                                                                                                                                                                                                                                                  |
| <b>Standard Agenda</b>                                       | <ul style="list-style-type: none"> <li>• Introductions</li> <li>• Outline of the day.</li> <li>• Establish the correct configuration for the portal.</li> <li>• Text and wording required for the portal.</li> <li>• Portal questions – when and where.</li> <li>• Set up any additional questions.</li> <li>• Set up letter templates for Pending, approved and Rejected Transport applications.</li> <li>• Test thoroughly.</li> <li>• Questions and anything else.</li> <li>• Review and conclusions</li> </ul> |
| <b>Outcomes</b>                                              | <ul style="list-style-type: none"> <li>• Users will be able to conduct extensive User Acceptance testing (UAT) within the TEST environment and satisfy themselves that the Portal configuration and set-up is correct and fit for intended purpose.</li> </ul>                                                                                                                                                                                                                                                     |

## Session 3: User Acceptance Testing

|                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
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| <b>Key Prerequisites</b><br>(full list provided in RAID log) | <ul style="list-style-type: none"> <li>• Transport Citizen Portal correctly configured within the TEST environment.</li> <li>• Some “dummy” applications to fully test the system from application submission through to approval/rejection.</li> <li>• Other pre-requisites as previously outlined in Session 2.</li> </ul>                                                                                                                                                                                                                 |
| <b>Objectives</b>                                            | <ul style="list-style-type: none"> <li>• Users will be able to fully test the Transport Citizen Portal within a “safe” TEST environment to ensure it fully meets their requirements.</li> </ul>                                                                                                                                                                                                                                                                                                                                              |
| <b>Audience</b>                                              | <ul style="list-style-type: none"> <li>• MRI Education Co-ordinator</li> <li>• Transport team members who will be using the Portal on a daily basis and processing Travel applications.</li> <li>• Those LA Officers responsible for matching back-office applications to enable the correct submission of Transport applications.</li> </ul>                                                                                                                                                                                                |
| <b>Standard Agenda</b>                                       | <ul style="list-style-type: none"> <li>• Submit an application as a parent.</li> <li>• Match the application within the back office (if not pulled straight through to Transport back office).</li> <li>• Process an approved application – test response to parent.</li> <li>• Process a rejected application – test response to parent.</li> <li>• Issue a journey notification – test response to parent.</li> <li>• Thoughts and observations and questions</li> <li>• Recommendations for changes when the portal goes LIVE.</li> </ul> |
| <b>Outcomes</b>                                              | <ul style="list-style-type: none"> <li>• The Local Authority has agreed the process to LIVE and is fully satisfied with the portal and the process.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                               |

## Session 4: LIVE Set-up and Floor Walking / Additional Training

|                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
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| <b>Key Prerequisites</b><br>(full list provided in RAID log) | <ul style="list-style-type: none"> <li>• Transport V4 is LIVE within the LA</li> <li>• Bases V4 is LIVE within the LA</li> <li>• B2B Student is LIVE within the LA</li> <li>• At least one other module within the Citizen Portal is LIVE and users are familiar with the Portal System Administration.</li> <li>• The LA have signed off UAT to confirm they are satisfied with the module and procedures for processing Citizen portal application.</li> </ul>                                                                                          |
| <b>Objectives</b>                                            | <ul style="list-style-type: none"> <li>• To establish a LIVE environment for the Transport Citizen Portal to enable the real time processing of Home to School Travel Applications.</li> <li>• To establish the correct configuration and wording for the Portal as agreed with the LA.</li> <li>• The LIVE set-up will mirror the TEST set-up with agreed changes to additional questions and portal wording as necessary.</li> <li>• Any changes which have been identified during UAT will be applied to the LIVE set-up and configuration.</li> </ul> |
| <b>Audience</b>                                              | <ul style="list-style-type: none"> <li>• MRI Education Co-ordinator responsible for Portal applications.</li> <li>• Transport Team members who will be dealing with Home to School Transport requests.</li> </ul>                                                                                                                                                                                                                                                                                                                                         |
| <b>Standard Agenda</b>                                       | <ul style="list-style-type: none"> <li>• Outline for the day.</li> <li>• Agreed changes to the portal to be applied and tested.</li> <li>• Testing and questions.</li> <li>• Switch on “go live”.</li> <li>• Floor walking to ensure everything working as agreed.</li> <li>• Conclusion</li> </ul>                                                                                                                                                                                                                                                       |

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|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Outcomes</b> | <ul style="list-style-type: none"> <li>• Transport Citizen Portal will be fully operational and available for the public to make on-line applications for Home to School Transport.</li> <li>• Users will be fully comfortable with all aspects of processing on-line applications for Home to School Transport.</li> </ul> |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

# Additional Service Options

The following service packages are also available from our Professional Services team, please speak to your Business Development Manager for further information and pricing:

| Optional Element                               | Number of Sessions | Description                                                                                                                                                                                                                                                                                                                                                                   |
|------------------------------------------------|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Process-specific User training options.        | 1                  | Should users of the Transport module or Transport Portal require any additional training time on any of the specific areas of the module(s) (eg back office matching and processing), an additional bespoke training session can be arranged.                                                                                                                                 |
| Remote Transport Portal Implementation Service | 4                  | <p>The remote Transport Portal implementation would follow the same steps as an on-site Portal implementation but without the on-site support, supervision and guidance of a Knowledge Specialist.</p> <p>LA's will be guided through the entire process by a series of remote demo's but would be expected to establish settings, templates, wording etc for themselves.</p> |
| Supported User Acceptance Training (UAT)       | 1                  | Users will be required to carry out system and process testing once the Test configuration on the module has been completed. This session provides support from our Knowledge Specialist to help ensure the testing is comprehensive and to quickly resolve any permissions or set-up issues.                                                                                 |
| Letters and Reports                            | As required        | Any amendments to letters and/or reports or new letters/reports that need creating will be priced on an individual basis.                                                                                                                                                                                                                                                     |