Early Years Citizen Portal 30 Hours – Implementation Package

Professional Services

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Contact

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Contents

Introduction

The aim of this solution is to assist authorities, providers and parents to ensure the smooth delivery of Citizen Portal 30 hours to meet the Government's Delivery Support Fund agenda and beyond.

Parents see personalised check results information. For example, when their child could start receiving the extended funding based on their age and local and national funding policies (this information is not provided as part of the DfE's Eligibility Checking Service).

With the parent's consent, detailed results of their check can be shared digitally with the providers including the earliest 30 hours funded start date.

Providers also see the additional information if they need to run checks to assist parents.

A **Parental Dashboard** shows changes to their 30 hour eligibility based on updating details with HMRC. Parents have instant access to all 30 hours related information, including details of providers offering 30 hours, to enable them to make more informed decisions about childcare.

Benefits

Parents can check their child's eligibility funding start date and share / un-share their information securely with the Provider(s) they choose.

Providers are notified about the shared data and can gain access to parental contact details.

A clear funding start date will be provided to both the Parent and the Provider leading to a more informed choice.

Once providers and parent have completed their declaration, the shared data can be accepted and will populate the next available Headcount Task.
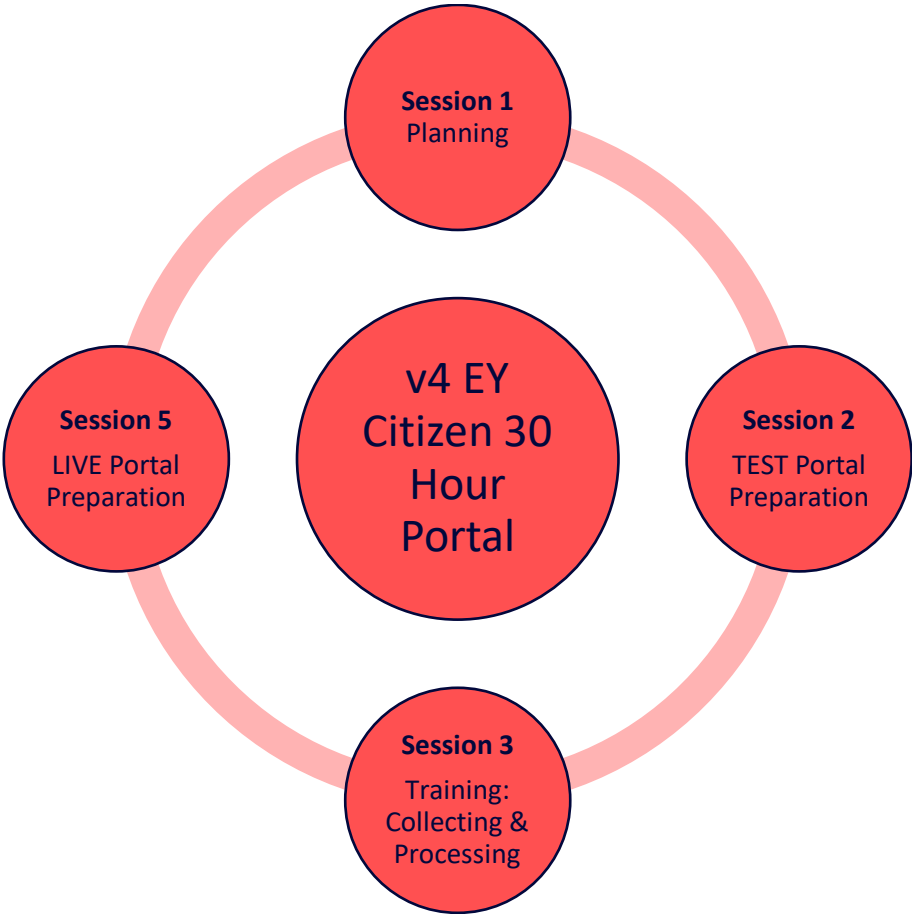
Pre-requisites

Your MRI Education Project manager will discuss the pre-requisites for this project in detail with you at the outset.

- Use of the MRI Education Early Years module and Headcount Portal is required for full integration

- If not already in use, the Citizen Portal will be installed as part of this project

- Access to participate in Microsoft Teams and or Webex sessions for support and configuration by the knowledge specialist

Service Overview

We will assist in the successful implementation of the v4 Citizen 30 Hours Portal by providing the following service.

We believe in a strong emphasis on a proactive partnership with the customer. The MRI Education Project Coordinator will work closely with the customer's appointed Project Lead throughout the project to achieve this. The MRI Education Project Coordinator is the coordinating MRI 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

This section provides the detailed tasks that MRI Education will complete in order to successfully implement the v4 Citizen 30 Hours Portal.

Session 1: Project Planning

Key Prerequisites (full list provided in RAID log)	• Early Years is licensed and migrated • Citizen Portal Installed • (Optional but recommended) - Access to a recently refreshed TEST instance of MRI Education
Objectives	• You will work with a MRI Education Knowledge Specialist to plan your EY Citizen Portal 30hrs implementation. • Project dates will be agreed, and any Risks and Actions identified • Early Years will be Demonstrated • Local Service requirements will be discussed e.g. DAF, EYPP
Audience	• MRI Education coordinators and key members of the Early Years team; it may be useful if a representative of the finance team is also available to discuss their availability • It is recommended that LA's have a representative from any 3rd party IT and network providers available if required to support the implementation
Standard Agenda	• Review the current use of EY Provider / Service 30 hour / Citizen Portal information within the Local Authority and the objectives for the implementation • Demonstration of the Citizen 30 Hours Portal • Demonstration of the Provider Portal functionality • Demonstration of the Portal Back Office functionality • Plan for the implementation of the Citizen 30 Hours Portal • Plan and request the technical work required to configure the Citizen Portal in Live and Test

	• Review project plan
Outcomes	• Capture key business processes in order to make recommendations for implementation approach • Update project plan to consider upgrades and key dates

Session 2: Test Portal Configuration

Key Prerequisites (full list provided in RAID log)	• System Administration access rights to v4 Client and Portal Test URLs
Objectives	• Configure the Test environment • Capture the necessary portal setup required for the Live system • Refine the business process and system recommendations as detailed in the project documentation • Creation of Training accounts for all delegates and Testers • User permissions requirements agreed and configured
Audience	• MRI Education Coordinator • EY Team Lead (Access to) • Internal I.T. Support Team (Access to) • MRI Education Knowledge Specialist

Standard Agenda	• Setting up Pilot users, map to people, User groups; agree and assign permissions for Citizen 30 Hours Portal module Admin, Conflict Processing, and Portal Users
	
	• Configuration of Citizen 30 Hours Portal in Test
	    • Title Headers, Images, Portal Content
	
	• Setup for Portal Data Conflict
	    • Approval / Reject

Outcomes	• Test System is ready for Training / User Acceptance Testing (UAT) • New Business Processes are defined • User permissions are assigned • Provide documentation to outline the configuration of the portal and the permissions applied

Session 3: Training Citizen 30 Hours Portal

Key Prerequisites (full list provided in RAID log)	• System Administration access rights to v4 Client and Test Provider Portal URL • Delegates bring sample data
Objectives	• EY Team to understand the efficient use of maintaining Citizen 30 Hours Portal • EY Team to understand the Provider usage of Citizen 30 Hours Portal shared data • EY Team to understand data conflict management
Audience	• EY Team • MRI Education Knowledge Specialist

Standard Agenda	• Citizen 30 Hours Portal module
	
	  • Features
	  • Security
	  • Site Logo
	  • Customising Portal Text
	  • Home Page Help
	
	• Parents/Providers
	
	  • Updating and Adding Portal registration
	  • Monitoring Progress
	  • Rejection and Acceptance
	  • Supporting Parents and Providers
	
	• Loading of Data
	
	  • Review status of submissions
	
	• Data Conflict Console for Accepting and Processing Data

Outcomes	• EY Team understand how to manage their data • Testers have enough knowledge to be able to carry out User Acceptance Testing

Session 4: Live Configuration

Key Prerequisites **(full list provided in RAID log)**	• Access to live environment of v4 Client, Live and Test Portal URLs via WebEx • System Administration access rights to MRI Education
Objectives	• Configure the Live environment
Audience	• MRI Education Coordinator • EY Team Lead • Internal I.T. Support Team • MRI Education Knowledge Specialist
Standard Agenda	• Configuration of Citizen 30 Hours Portal module in Live • Title Headers, Images, Portal Content • Setup for EY Citizen 30 Hours Portal Data • Permissions for User Groups and Reporting
Outcomes	• Live System is ready for Go Live

Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
Creation of Management Information Reports to support the Early Years Module Reporting requirements can be documented during the project. If support is required to produce these reports this work can be estimated and costs provided based on the exact requirements of the LA. Please discuss your requirements with your Account Manager Benefits Reports can be produced to display any information recorded in the MRI Education database, this information can be used to export payments to your finances solution, to provide transactions to providers, check data quality which in return can be used to inform training Cost: Subject to Scoping	TBC	Professional Services
Refresher Training / New User Training Training on any / all of the Early Years Suite of products: • Early Years Back-Office • Portal Back-Office • Two-Year-Old Funding Portal • Self-Update Portal • Headcount Portal • Better Start Portal Delivery of training will be based on your exact requirements, and can be hands on or chalk-and-talk as required. Please discuss your requirements with your Account Manager Benefits New starters can be trained to a high standard, existing users can gain better perspective on the existing Early Years functionality, often in areas that are overlooked or if used correctly will streamline processes.	TBC	Professional Services

Additional Elements (as required)	Sessions required	Resource Required
Cost: Subject to Scoping		
Ask the Expert Sessions If you need adhoc support for the MRI Education Early Years suite of modules that you do not consider warrants a full training session, then one of our Ask the Expert sessions may be a better way of providing this support. A Knowledge Specialist will work with you remotely to answer questions / demonstrate requested functionality. Cost: Subject to Scoping	TBC	Professional Services
Customised Integrated Finance Export Tool MRI Education integration Services can create custom tools to export your payments; in a required format, for you to import directly into your financial payment solution. Benefits Helps integrate into your end-to-end financial process Cost: Subject to Scoping	TBC	MRI Education Integration Services

Additional Elements (as required)	Sessions required	Resource Required
IDACI integration for individual Spot or SFF payments MRI Education integration Services can work with you to create custom tools to calculate IDACI supplementary payments and integrate these directly into your child finances, ready for generation as part of your financial process. Benefits Reduction of manual processes of complex individual hourly rates or spot payments Cost: Subject to Scoping	TBC	MRI Education Integration Services