

Capita



# Early Years – Provider Portal Headcount– Implementation Package

Professional Services

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## Introduction

This document outlines Capita's standard approach for the implementation of v4 Early Years Headcount Collection using the One Provider Portal for both the Local Authority and Service Provider.

The Headcount module allows Providers, with permission, to record their Child Funding data in the Provider Portal. This transfers to your Local Authority One Database. The Provider can make changes and submit them until Headcount closes. Allowing the Local Authority to monitor children's finances much more easily.

This means there is no longer a requirement to gather this information from providers, either on paper or via spreadsheets. Streamlining the process of updating and changing the information and improving the speed and quality of data flow. Keeping the financial data up to date in the Early Years central system.

## Benefits

### Project Management

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

### Early Years Process Review

Undertake a review of your current usage of the Early Years module. Providing you with an overview of how you would use the One Early Years Headcount Portal, and where possible, improve your existing processes.

### System & Portal Setup (Test / Live)

Advise and assist you in portal configuration and data setup based on your requirements.

### Training for LA

Train the Early Years team on the collection and processing of headcount funding hours. Training material are provided to support this.

### Reporting

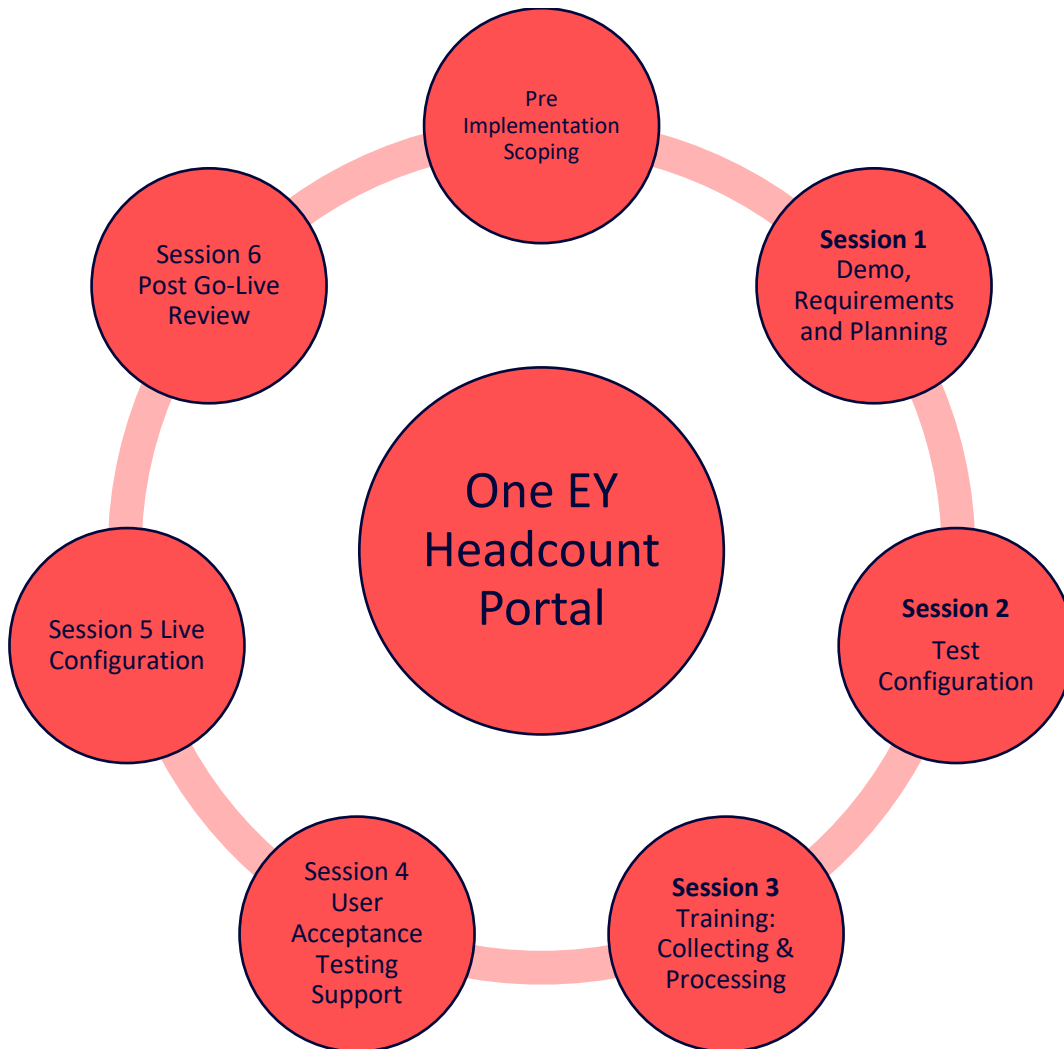
If you require Capita to create reports, we can arrange a scoping session and provide a quotation for the reports.

## Prerequisites

- Capita One Early Years module is required for collection of funded hours from the Provider Portal.
- Scheduled Tasks must be imported into v4 (Technical Guide - v4 Scheduled Tasks)

## Service Overview

Capita will assist in the successful implementation of the Early Years Headcount Portal 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

The following sections provide detailed tasks that Capita will complete to successfully implement the Headcount Portal.

### Prerequisite: Pre-Implementation Scoping

<b>Objectives</b>	<ul style="list-style-type: none"> <li>You will work with a Capita Knowledge Specialist to discuss your EY Headcount Portal implementation needs; this will identify any extra sessions or further requirements necessary for providing an accurate sales brief.</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>One coordinators and key Early Years stakeholder</li> <li>Capita Account Manager</li> <li>Capita Knowledge Specialist</li> <li>It is recommended that LA's have a representative from any 3rd party IT and network providers available if required to support the implementation</li> </ul>
<b>Standard Agenda</b>	<ul style="list-style-type: none"> <li>Identify areas of variation from this standard EY Headcount Portal Work Package</li> <li>Discuss all functionality that a new customer requires as part of the Headcount module implementation</li> </ul> <div data-bbox="576 1317 1469 1397" style="border: 1px solid red; padding: 5px;"> <p><i>Please discuss any data migration needs with us in addition to the module implementation. E.g. Historic Children / EYPP / DAF / 30hrs</i></p> </div>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>Local Authority and Capita Knowledge Specialist / Account Manager have comprehensive knowledge of the Early Years Implementation requirements</li> </ul>

## Session 1: Demo, Requirements and Planning

<b>Key Prerequisites</b> (full list provided in RAID log)	<ul style="list-style-type: none"> <li>• (Optional but recommended) - Access to a recently refreshed TEST instance of One</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Plan for the implementation of the EY Headcount module Universal / Extended funding</li> <li>• Plan and request the technical work required to configure the Headcount Portal in Live and Test</li> <li>• Establish the current use of Early Years within the Local Authority</li> <li>• Overview of Portal functionality</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• One Coordinator</li> <li>• Early Years / Finances Team</li> <li>• Internal I.T. Support Team</li> <li>• Capita Knowledge Specialist</li> <li>• It is recommended that LA's have a representative from any 3rd party IT and network providers available if required to support the implementation</li> </ul>
<b>Standard Agenda</b>	<ul style="list-style-type: none"> <li>• Current usage of Early Years module, reviewing all the areas used, how funding is managed and management information reports</li> <li>• Demonstration of the One Provider Portal functionality (Administrator)</li> <li>• Demonstration of Headcount Collection functionality (User)</li> <li>• Demonstration of the One Provider Data Contention functionality</li> <li>• Confirmation of local service objectives for Early Years and Provider Services Teams</li> <li>• Establish project plan</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Capture key business processes in order to make recommendations for implementation approach</li> </ul>



	<ul style="list-style-type: none"><li>• Produce a project plan to consider upgrades and key dates</li><li>• Following the WebEx session, the Knowledge Specialist will compile a document to summarise the findings of the session and suggested implementation approach for the Headcount Portal.</li><li>• Provider documentation will also be made available that can be edited to suit your requirements and processes, supporting your training of the Service Providers.</li></ul>
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## Session 2: Headcount TEST Configuration

<b>Key Prerequisites</b> (full list provided in RAID log)	<ul style="list-style-type: none"> <li>• System Administration access rights to One</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Setup and establish the Test environment for training users</li> <li>• Capture the necessary portal setup required for the live system</li> <li>• Refine the business process requirements</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• One Coordinator</li> <li>• Early Years Funding Team Lead accessible by email or phone</li> <li>• Internal I.T. Support Team</li> <li>• Capita Knowledge Specialist</li> <li>• It is recommended that LA's have a representative from any 3rd party IT and network providers available if required to support the implementation</li> </ul>
<b>Standard Agenda</b>	<ul style="list-style-type: none"> <li>• Setting up Pilot users, map to people, User groups and permissions for EY Provider portal Admin, Portal Users and Back Office Conflict Processing</li> <li>• Configuration of One Headcount Portal in Test             <ul style="list-style-type: none"> <li>• Messages, Title Headers, Images, Portal Content</li> </ul> </li> <li>• Setup for Early Years finance             <ul style="list-style-type: none"> <li>• Years, Terms, Payment Parameters</li> <li>• Stretched Offer</li> </ul> </li> <li>• Setup for Early Years Data Conflict             <ul style="list-style-type: none"> <li>• Matching rules</li> </ul> </li> <li>• Reporting</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Test System is ready for Training / User Acceptance Testing (UAT)</li> <li>• Key module setup is captured and documented</li> <li>• New Business Processes are defined</li> </ul>

## Session 3: Training: Collecting & Processing Headcount & Funding

<b>Key Prerequisites</b> (full list provided in RAID log)	<ul style="list-style-type: none"> <li>• System Administration access rights to One</li> <li>• Training accounts for all delegates</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Early Years Funding Team to understand the efficient use of maintaining data</li> <li>• Early Years Funding Team to understand the usage of Headcount Portal</li> <li>• Early Years Funding Team to understand the Headcount Collection functionality</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• Early Years Funding Team</li> <li>• Capita Knowledge Specialist</li> </ul>
<b>Standard Agenda</b>	<ul style="list-style-type: none"> <li>• One Headcount Portal             <ul style="list-style-type: none"> <li>• Features</li> </ul> </li> <li>• Security             <ul style="list-style-type: none"> <li>• Customising Texts</li> <li>• Providers</li> <li>• Updating, Portal Access and Tasks</li> </ul> </li> <li>• Tasks             <ul style="list-style-type: none"> <li>• Creating Headcount Collection Tasks</li> <li>• Monitoring Progress</li> <li>• Sending Reminders</li> <li>• Retracting Tasks</li> <li>• Supporting Service Providers</li> </ul> </li> <li>• Messages             <ul style="list-style-type: none"> <li>• Creating &amp; Managing Tasks</li> <li>• Creating Messages</li> <li>• Message Templates</li> </ul> </li> <li>• Loading of Data             <ul style="list-style-type: none"> <li>• Review status of submissions</li> </ul> </li> </ul>

	<ul style="list-style-type: none"><li>• Scheduling</li><li>• Data Conflict Console for Accepting and Processing Data</li><li>• Portal Back Office / Early Years module</li><li>• Portal Reports</li><li>• Generating, reviewing &amp; publishing payment reports</li></ul>
<b>Outcomes</b>	<ul style="list-style-type: none"><li>• Early Years Funding Team understand how to manage their data and are UAT ready</li><li>• Key module setup is captured and documented</li><li>• New Business Processes are defined</li></ul>

## Session 4: User Acceptance Testing Support

<b>Key Prerequisites</b> <b>(full list provided in RAID log)</b>	<ul style="list-style-type: none"> <li>• UAT has been carried out in the LA and any Testing feedback has been provided to the Project Manager prior to this session</li> <li>• System Administration access rights to One</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Knowledge Specialist to provide advice and guidance on issues arising during testing</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• One Coordinator</li> <li>• EY Testing Lead</li> <li>• Capita Knowledge Specialist</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• All issues arising from testing known and prioritised</li> <li>• Majority of issues resolved by Knowledge Specialist</li> <li>• Service Desk calls logged where required</li> <li>• After the session Project Manager will provide feedback on any issues raised</li> </ul>

## Session 5: Headcount LIVE Configuration

<b>Key Prerequisites</b> (full list provided in RAID log)	<ul style="list-style-type: none"> <li>• Provide access to a LIVE instance of One</li> <li>• System Administration access rights to One</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Setup and establish the Live environment</li> <li>• Refine the business process requirements</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• One Coordinator</li> <li>• Early Years Funding Team Lead accessible by email or phone</li> <li>• Internal I.T. Support Team</li> <li>• Capita Knowledge Specialist</li> </ul>
<b>Standard Agenda</b>	<ul style="list-style-type: none"> <li>• Setting up user groups and permissions for EY Provider portal Admin, Portal Users and Back Office Conflict Processing</li> <li>• Configuration of One Headcount Portal in Live             <ul style="list-style-type: none"> <li>• Messages, Title Headers, Images, Portal Content</li> </ul> </li> <li>• Setup for Early Years finance             <ul style="list-style-type: none"> <li>• Years, Terms, Payment Parameters</li> </ul> </li> <li>• Setup for Early Years Data Conflict             <ul style="list-style-type: none"> <li>• Matching rules</li> </ul> </li> <li>• Reporting</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Test System is ready for Go-Live</li> </ul>

## Session 6: Post Go-Live Review

<b>Key Prerequisites</b> (full list provided in RAID log)	<ul style="list-style-type: none"> <li>• System Administration access rights to ONE</li> <li>• LA has implemented the EY Headcount Module (across all providers or as a pilot)</li> </ul>
<b>Objectives</b>	<ul style="list-style-type: none"> <li>• Review the Live implementation and provide advice / guidance where required</li> </ul>
<b>Audience</b>	<ul style="list-style-type: none"> <li>• One Coordinator</li> <li>• Early Years Team Lead</li> <li>• Capita Knowledge Specialist</li> </ul>
<b>Outcomes</b>	<ul style="list-style-type: none"> <li>• Live implementation is fully operational and ready to sign-off</li> </ul>

## Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
<p><b>Creation of Management Information Reports to support the Early Years Module</b></p> <p>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</p> <p><b>Benefits</b></p> <p>Reports can be produced to display any information recorded in the One 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</p> <p><b>Cost:</b> Subject to Scoping</p>	TBC	Professional Services
<p><b>Refresher Training / New User Training</b></p> <p>Training on any/all of the Early Years Suite of products:</p> <ul style="list-style-type: none"> <li>• Early Years Back-Office</li> <li>• Portal Back-Office</li> <li>• Two-Year-Old Funding Portal</li> <li>• Self-Update Portal</li> <li>• Headcount Portal</li> <li>• Better Start Portal</li> </ul> <p>Delivery of training will be based on your exact requirements, and can be hands on, chalk-and-talk as required.</p> <p>Please discuss your requirements with your Account Manager</p> <p><b>Benefits</b></p> <p>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 make processes smoother.</p> <p><b>Cost:</b> Subject to Scoping</p>	TBC	Professional Services



Additional Elements (as required)	Sessions required	Resource Required
<p><b>Ask the Expert Sessions</b></p> <p>If you need adhoc support for the Capita One 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.</p> <p><b>Cost:</b> Subject to Scoping</p>	TBC	Professional Services
<p><b>Customised Integrated Finance Export Tool</b></p> <p>Capita One integration Services can create custom tools to export your payments; in a required format, for you to import directly into your financial payment solution.</p> <p><b>Benefits</b></p> <p>This will help to integrate into your end-to-end financial process</p> <p><b>Cost:</b> Subject to Scoping</p>	TBC	One Integration Services
<p><b>IDACI integration for individual Spot or SFF payments</b></p> <p>Capita One 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.</p> <p><b>Benefits</b></p> <p>Reduction of manual processes of complex individual hourly rates or spot payments</p> <p><b>Cost:</b> Subject to Scoping</p>	TBC	One Integration Services