



Early Years – Provider Portal Headcount - Implementation Package

Professional Services



Copyright

© 2025 MRI Software LLC - All Rights Reserved. It is confidential and commercially sensitive and must not be distributed in any form without prior permission of a manager from MRI Software. If you do not have authorisation to receive this document, please return it to the author as soon as possible.

Contact

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

Contents

- Contents 3
- Introduction 4
- Benefits..... 5
 - Project Management* 5
 - Early Years Process Review*..... 5
 - System & Portal Setup (Test / Live)* 5
 - Training for LA*..... 5
 - Reporting*..... 5
- Prerequisites 6
- Service Overview 7
- Service Details 8
 - Prerequisite: Pre-Implementation Scoping* 8
 - Session 1: Demo, Requirements and Planning* 9
 - Session 2: Headcount TEST Configuration*..... 11
 - Session 3: Training: Collecting & Processing Headcount & Funding* 12
 - Session 4: User Acceptance Testing Support* 14
 - Session 5: Headcount LIVE Configuration*..... 15
 - Session 6: Post Go-Live Review* 16
- Additional Service Options 17

Introduction

This document outlines MRI Education's standard approach for the implementation of v4 Early Years Headcount Collection using the MRI Education 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 MRI Education 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

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

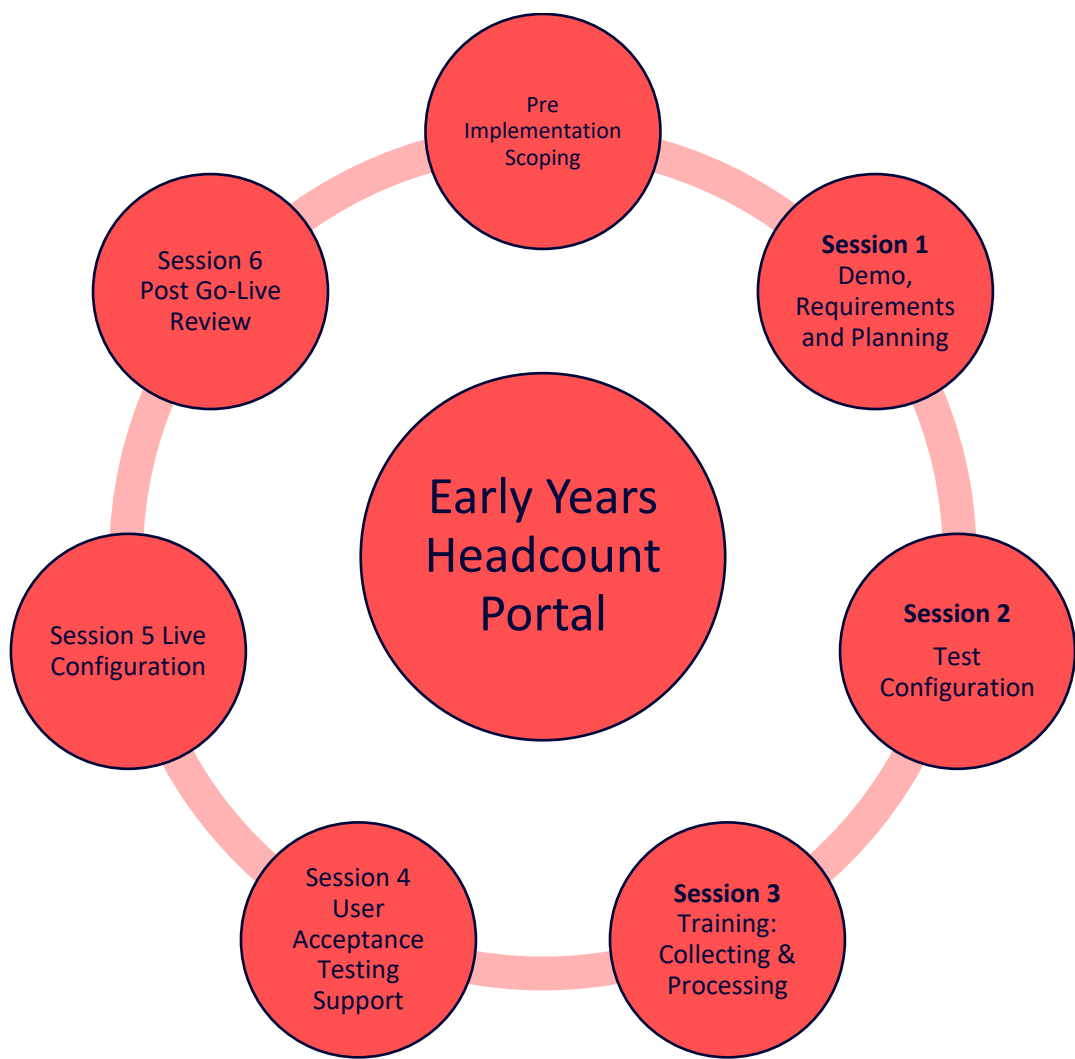
If you require MRI Education to create reports, we can arrange a scoping session and provide a quotation for the reports.

Prerequisites

- MRI Education 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

We will assist in the successful implementation of the Early Years Headcount Portal by providing the following:



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

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

Prerequisite: Pre-Implementation Scoping

Objectives	You will work with a MRI Education 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.
Audience	- MRI Education coordinators and key Early Years stakeholder - MRI Education Account Manager - MRI Education Knowledge Specialist - 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	- Identify areas of variation from this standard EY Headcount Portal Work Package - Discuss all functionality that a new customer requires as part of the Headcount module implementation <i>Please discuss any data migration needs with us in addition to the module implementation. E.g. Historic Children / EYPP / DAF / 30hrs</i>
Outcomes	Local Authority and MRI Education Knowledge Specialist / Account Manager have comprehensive knowledge of the Early Years Implementation requirements

Session 1: Demo, Requirements and Planning

Key Prerequisites (full list provided in RAID log)	• (Optional but recommended) - Access to a recently refreshed TEST instance of MRI Education
Objectives	• Plan for the implementation of the EY Headcount module Universal / Extended funding • Plan and request the technical work required to configure the Headcount Portal in Live and Test • Establish the current use of Early Years within the Local Authority • Overview of Portal functionality
Audience	• MRI Education Coordinator • Early Years / Finances Team • Internal I.T. Support Team • MRI Education Knowledge Specialist • 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	• Current usage of Early Years module, reviewing all the areas used, how funding is managed and management information reports • Demonstration of the Provider Portal functionality (Administrator) • Demonstration of Headcount Collection functionality (User) • Demonstration of the Provider Data Contention functionality • Confirmation of local service objectives for Early Years and Provider Services Teams • Establish project plan
Outcomes	• Capture key business processes in order to make recommendations for implementation approach • Produce a project plan to consider upgrades and key dates

	• 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. • Provider documentation will also be made available that can be edited to suit your requirements and processes, supporting your training of the Service Providers.
--	--

Session 2: Headcount TEST Configuration

Key Prerequisites (full list provided in RAID log)	• System Administration access rights to MRI Education
Objectives	• Setup and establish the Test environment for training users • Capture the necessary portal setup required for the live system • Refine the business process requirements
Audience	• MRI Education Coordinator • Early Years Funding Team Lead accessible by email or phone • Internal I.T. Support Team • MRI Education Knowledge Specialist • 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	• Setting up Pilot users, map to people, User groups and permissions for EY Provider portal Admin, Portal Users and Back Office Conflict Processing • Configuration of Headcount Portal in Test • Messages, Title Headers, Images, Portal Content • Setup for Early Years finance • Years, Terms, Payment Parameters • Stretched Offer • Setup for Early Years Data Conflict • Matching rules • Reporting
Outcomes	• Test System is ready for Training / User Acceptance Testing (UAT) • Key module setup is captured and documented • New Business Processes are defined

Session 3: Training: Collecting & Processing Headcount & Funding

Key Prerequisites (full list provided in RAID log)	• System Administration access rights to MRI Education • Training accounts for all delegates
Objectives	• Early Years Funding Team to understand the efficient use of maintaining data • Early Years Funding Team to understand the usage of Headcount Portal • Early Years Funding Team to understand the Headcount Collection functionality
Audience	• Early Years Funding Team • MRI Education Knowledge Specialist
Standard Agenda	• Headcount Portal • Features • Security • Customising Texts • Providers • Updating, Portal Access and Tasks • Tasks • Creating Headcount Collection Tasks • Monitoring Progress • Sending Reminders • Retracting Tasks • Supporting Service Providers • Messages • Creating & Managing Tasks • Creating Messages • Message Templates • Loading of Data • Review status of submissions • Scheduling

	• Data Conflict Console for Accepting and Processing Data • Portal Back Office / Early Years module • Portal Reports • Generating, reviewing & publishing payment reports
Outcomes	• Early Years Funding Team understand how to manage their data and are UAT ready • Key module setup is captured and documented • New Business Processes are defined

Session 4: User Acceptance Testing Support

Key Prerequisites (full list provided in RAID log)	• UAT has been carried out in the LA and any Testing feedback has been provided to the Project Manager prior to this session • System Administration access rights to MRI Education
Objectives	• Knowledge Specialist to provide advice and guidance on issues arising during testing
Audience	• MRI Education Coordinator • EY Testing Lead • MRI Education Knowledge Specialist
Outcomes	• All issues arising from testing known and prioritised • Majority of issues resolved by Knowledge Specialist • Service Desk calls logged where required • After the session Project Manager will provide feedback on any issues raised

Session 5: Headcount LIVE Configuration

Key Prerequisites (full list provided in RAID log)	• Provide access to a LIVE instance of MRI Education • System Administration access rights to MRI Education
Objectives	• Setup and establish the Live environment • Refine the business process requirements
Audience	• MRI Education Coordinator • Early Years Funding Team Lead accessible by email or phone • Internal I.T. Support Team • MRI Education Knowledge Specialist
Standard Agenda	• Setting up user groups and permissions for EY Provider portal Admin, Portal Users and Back Office Conflict Processing • Configuration of Headcount Portal in Live • Messages, Title Headers, Images, Portal Content • Setup for Early Years finance • Years, Terms, Payment Parameters • Setup for Early Years Data Conflict • Matching rules • Reporting
Outcomes	• Test System is ready for Go-Live

Session 6: Post Go-Live Review

Key Prerequisites (full list provided in RAID log)	• System Administration access rights to MRI Education • LA has implemented the EY Headcount Module (across all providers or as a pilot)
Objectives	• Review the Live implementation and provide advice / guidance where required
Audience	• MRI Education Coordinator • Early Years Team Lead • MRI Education Knowledge Specialist
Outcomes	• Live implementation is fully operational and ready to sign-off

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, 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 make processes smoother.	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 MRI Education 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 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 This will help to 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 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