

Capita



Early Years – Two Year Old Funding Portal – Implementation Package

Professional Services

Copyright

Copyright © 2023 Capita Business Services Limited. All rights reserved. No part of this publication may be reproduced, photocopied, stored on a retrieval system, translated, or transmitted without the express written consent of the publisher. Microsoft® and Windows® are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries.

Contact Capita

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

Contents

Contents	2
Introduction	3
Benefits	3
Pre-requisites	4
Service Overview	5
Project Management.....	5
System & Portal Setup (Test / Live)	5
Training for LA	6
Reporting	6
Service Details	7
Prerequisite: Pre-Implementation Scoping	7
Session 1: Project Planning Session.....	8
Session 2: TEST Configuration	10
Session 3: TYOF Applications & Placements.....	11
Session 4: UAT Support	13
Session 5: LIVE Configuration.....	14
Session 6: Go-Live Support.....	15
Additional Service Options	16

Introduction

This document outlines Capita's standard approach for the implementation of the Two Year Old Funding (TYOF) module within the Citizen and Provider Portals for both the Local Authority and Service Provider.

TYOF portal creates an easy environment for parents to get assistance with their TYOF checks. If they prefer more control of their data, they can self-register and apply the check through the One Citizen Self Service Portal.

The Capita One Early Years module provides a comprehensive recording mechanism to support Early Years teams to manage the Early Years provision within their LA. Includes the management and generation of payments, administration of the headcount process and the ability to record information to support and evidence the quality assurance work undertaken. The TYOF Portal supports the self-service and assisted application checks for eligibility which directly control the funding that can be applied against a child record.

Due to the business-critical nature of this solution it is vital that local authorities implement this portal in a structured way. Ensuring a smooth and seamless implementation of the EY module and the maximum realisation of benefits.

Local authorities can benefit from the vast experience of our dedicated EY delivery team. EY Specialists can guide Local Authorities through the implementation process. The EY delivery team have worked closely with our product development team over several years. They have guided many authorities through migrations onto our latest platform and brand-new implementations of the module.

It is important to us that all local authorities have access to our team of EY Specialists. Receiving support and guidance where necessary. Ensuring that the implementation process runs smoothly. Effectively managing resources and ensuring local authorities receive support when required. We have created a detailed One Early Years TYOF Implementation Programme.

Benefits

- The Early Years module helps with audit and tracking payments from the Local Authority, through your finances system to the providers
- With a single child record being shared amongst your other services there is greater potential for children being provided for sufficiently leading to more efficiently targeted services
- Integrated funding for Forecast, Actual and Adjustments of Universal, Extended, Two-Year-Old Funding, EY Pupil Premium, Disability Access Funding, Adhoc Payments, SFF, Spot Payments
- Generation and Authorisation of finances can be separated to conform to local audit policies, and an overview of payments by multiple stakeholders will help identify inaccurate payments early

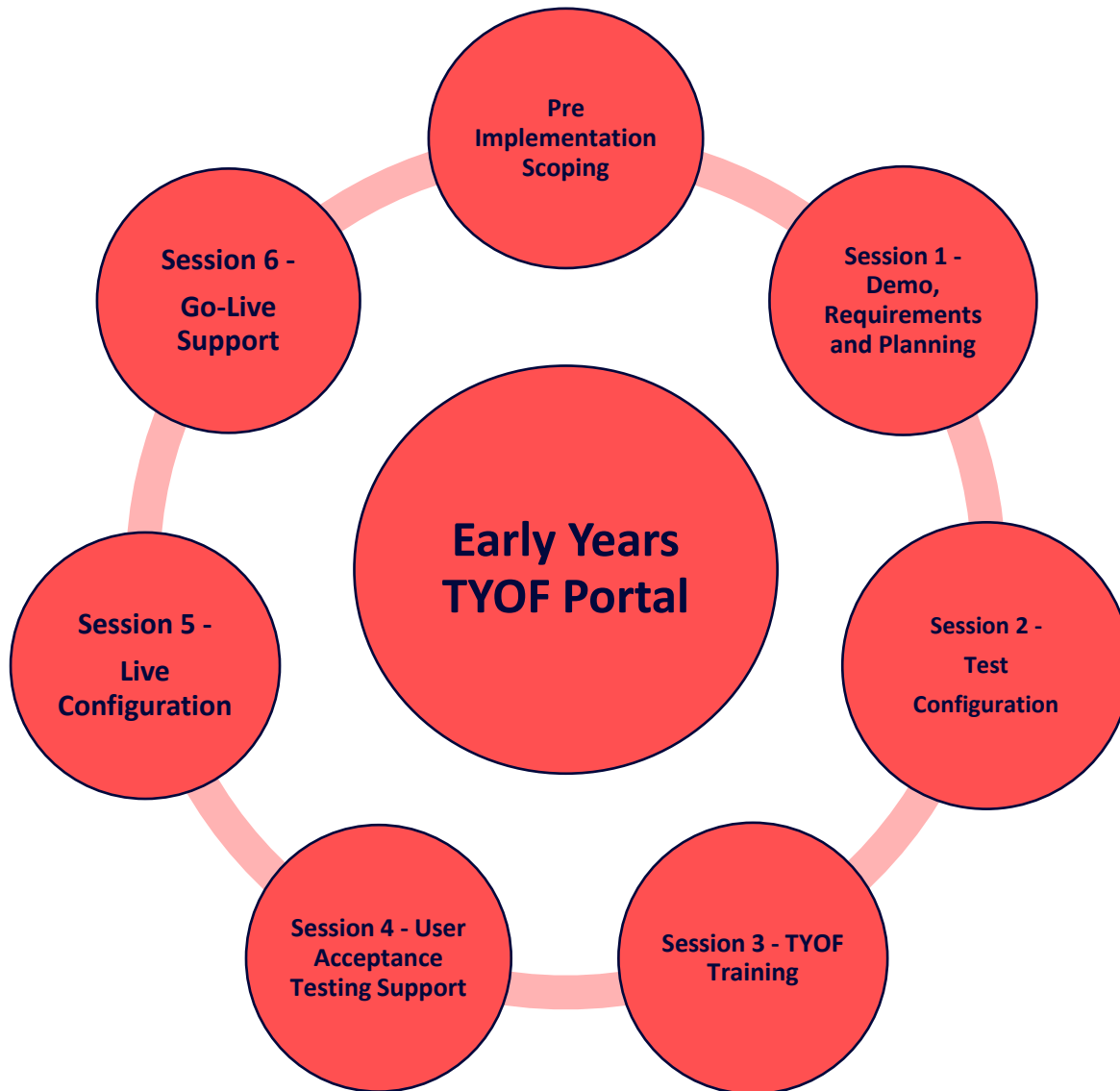
Pre-requisites

- This work package is based on a typical Capita One Early Years Two Year Old Funding Implementation. A pre-implementation scoping session must have been completed with a Capita Knowledge Specialist to identify any differences or extras that you may require. This ensures there are no mid-implementation surprises.
- You will need to have completed an ECS Accreditation form to apply for the TYOF ECS checking account.
- An existing single user account used for individual checks is not acceptable to the ECS service, neither is an existing account that was applied for against another software solution.
- To access the ECS Accreditation Application Utility already prepopulated with Capita One details, go to our software support portal <https://support.capitasoftware.com/> and search for **KB0026532**

Note: You will need to register for a support account to gain access. You can ask your Capita One Project Manager to provide this if you cannot get access yourself

Service Overview

Capita will assist in the successful implementation of the Early Years Module by providing the following:



Project Management

Capita believe in a strong emphasis on a proactive partnership with the customer. The 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 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.

System & Portal Setup (Test / Live)

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

Training for LA

We train the Local Authority TYOF team on the collection and processing of TYOF. Training materials will be provided to support this.

Reporting

If you require Capita to create reports, we will send you a scoping document to complete/arrange a scoping session. Then provide a quotation for the reports.

Service Details

Prerequisite: Pre-Implementation Scoping

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> • TBC • Citizen Portal already in use
Objectives	<ul style="list-style-type: none"> • You will work with a Capita Knowledge Specialist to discuss your Early Years TYOF implementation needs, this will identify any extra sessions or further requirements necessary for providing an accurate sales brief.
Audience	<ul style="list-style-type: none"> • One coordinators and key Early Years stakeholder • Capita Account Manager
Standard Agenda	<ul style="list-style-type: none"> • Identify areas of variation from this standard Early Years TYOF Work Package • Discuss all functionality that a new customer requires as part of the Early Years TYOF Portal implementation. <div data-bbox="659 1220 1350 1326" style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p><i>Please discuss any data migration needs with us in addition to the module implementation. E.g. Historic Children, TYOF checks, EYPP checks, 30 hour checks</i></p> </div>
Outcomes	<ul style="list-style-type: none"> • Local Authority and Account Manager have comprehensive knowledge of the One Early Years TYOF Implementation requirements.

Session 1: Project Planning Session

<p>Key Prerequisites (full list provided in RAID log)</p>	<ul style="list-style-type: none"> • The project manager will have taken you through all prerequisites before providing your own Risk, Actions, Issues and Decisions project log • These prerequisites must have been completed before the Test system can be configured • Capita One Early Years is licensed and in use • Provide a meeting room with access to a recently refreshed TEST instance of ONE
<p>Objectives</p>	<ul style="list-style-type: none"> • You will work with a Capita Knowledge Specialist to plan your One Early Years TYOF implementation. • Project dates will be agreed, and any Risks and Actions identified • Early Years TYOF Portal will be Demonstrated • Local Service requirements will be discussed
<p>Audience</p>	<ul style="list-style-type: none"> • One 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
<p>Standard Agenda</p>	<ul style="list-style-type: none"> • Prerequisites identified and owned • Discuss Assigning Project Tasks • Agree Any Outstanding Dates • Provision of RAID Log • Current usage of Early Years module, reviewing the areas used, how funding is managed and management information reports • Demonstration of the TYOF module functionality (Administrator) • Demonstration of TYOF Collection functionality (User)

	<ul style="list-style-type: none"> • Demonstration of the One Provider Data Contention functionality • Demonstration of the TYOF Placement functionality • Confirmation of local service objectives for Early Years and TYOF Services Teams <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p><i>Please discuss any data migration needs with us in addition to the module implementation.</i></p> </div>
<p>Outcomes</p>	<ul style="list-style-type: none"> • All preparation tasks and requirements are identified and planned for • Provisional project dates booked for the entire project • Discuss Report requirements

Session 2: TEST Configuration

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> • Licence installed for One Early Years TYOF • Provide access to a recently refreshed Test instance of Capita One • System Administration access rights to Capita One • ECS Check set to Mock not Live • Test URLs provided for TYOF Portal / Portal Back-Office
Objectives	<ul style="list-style-type: none"> • 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	<ul style="list-style-type: none"> • This session is intended for One Coordinators who will manage the administration of users/permissions • Early Years Manager and key members of the TYOF business team should be available by phone/email
Standard Agenda	<ul style="list-style-type: none"> • Setting up Pilot users, map to people • ECS Check • User groups and permissions for: • TYOF module Admin and Portal Users, and Back Office Conflict Processing • Configuration of One TYOF module in Test • Messages, Title Headers, Images, Portal Content • Setup for One Student Data Conflict • Matching rules • End-to-end EY Test
Outcomes	<ul style="list-style-type: none"> • Early Years TYOF Portal is ready for Training / User Acceptance Testing (UAT) • Users are set up with the correct permissions required for training

Session 3: TYOF Applications & Placements

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> • System Administration access rights to One • Test URLs provided for TYOF Portal / Portal Back-Office • Delegate details provided for training • Email services running on Test
Objectives	<ul style="list-style-type: none"> • TYOF Team to understand the efficient use of maintaining data in One EY. • TYOF Team to understand the usage of One TYOF module • TYOF Team to understand the TYOF placement functionality
Audience	<ul style="list-style-type: none"> • This session is intended for One Coordinators who will manage the administration of users/permissions • Early Years Manager and key members of the TYOF business team • 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	<ul style="list-style-type: none"> • One TYOF module features <ul style="list-style-type: none"> • Security • Site Logo • Customising • Home Page Help • Providers / Citizens <ul style="list-style-type: none"> • Updating and Adding Portal access • Monitoring Progress • Rejection and Acceptance • Supporting Service Providers • Loading of Data <ul style="list-style-type: none"> • Review status of submissions • Data Conflict Console for Accepting and Processing Data

	<ul style="list-style-type: none">• Portal Back Office / One EY
Outcomes	<ul style="list-style-type: none">• Users can navigate the EY TYOF module and to carry out routine tasks• Users can confidently carry out UAT

Session 4: UAT Support

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> LA must have completed their User Acceptance Testing
Objectives	<ul style="list-style-type: none"> The Knowledge Specialist will provide help and answers to the LA results of the UAT
Audience	<ul style="list-style-type: none"> Early Years Data Team Early Years Finances Team Early Years TYOF Manager One Coordinator / 3rd Party Support
Standard Agenda	<ul style="list-style-type: none"> A Question and Answer session based on any questions / issues arising from UAT Demonstrations and advice as necessary
Outcomes	<ul style="list-style-type: none"> The Local Authority Early Years TYOF Support are satisfied that their UAT has been successful and they can sign their testing off, allowing for Live Configuration

Session 5: LIVE Configuration

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> • Licence installed for One Early Years TYOF • Provide access to the Live instance of Capita One • System Administration access rights to Capita One • Live URLs provided for TYOF Portal / Portal Back-Office • Sample real TYOF data provided for checking
Objectives	<ul style="list-style-type: none"> • The One Early Years TYOF Live environment configured and tested according to the recommendations from the previous sessions • The users are set up with the correct permissions
Audience	<ul style="list-style-type: none"> • This session is intended for One Coordinators who will manage the administration of users/permissions • Early Years Manager and key members of the business team / 3rd Party support should be available by phone/email
Standard Agenda	<ul style="list-style-type: none"> • Live Setup and Verification <ul style="list-style-type: none"> • Messages, Title Headers, Images, Portal Content • Populate Agreed User Groups • Configure EY TYOF • Setup for One Student Data Conflict <ul style="list-style-type: none"> • Matching rules • End-to-end EY Test (as allowed on Live)
Outcomes	<ul style="list-style-type: none"> • Live System is ready for Go Live • Users are set up with the correct permissions required for EY Roles

Session 6: Go-Live Support

Key Prerequisites (full list provided in RAID log)	<ul style="list-style-type: none"> • LA must be ready for go-live
Objectives	<ul style="list-style-type: none"> • The Knowledge Specialist will provide help and support during or post EY go-live
Audience	<ul style="list-style-type: none"> • Early Years Data Team • Early Years Finances Team • Early Years TYOF Manager • One Coordinator / 3rd Party Support by email/phone
Standard Agenda	<ul style="list-style-type: none"> • A Question and Answer session based on any questions / issues arising from go-live • Demonstrations and advice as necessary
Outcomes	<ul style="list-style-type: none"> • The Local Authority Early Years Support are satisfied that they are comfortable with their processes

Additional Service Options

Additional Elements (as required)	Sessions required	Resource Required
<p>Creation of Management Information Reports to support the Early Years Module</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>Benefits</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>Cost: Subject to Scoping</p>	TBC	Professional Services
<p>Refresher Training / New User Training</p> <p>Training on any/all of the Early Years Suite of products:</p> <ul style="list-style-type: none"> • Early Years Back-Office • Portal Back-Office • Two-Year-Old Funding Portal • Self-Update Portal • Headcount Portal • Better Start Portal <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>Benefits</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>Cost: Subject to Scoping</p>	TBC	Professional Services

Additional Elements (as required)	Sessions required	Resource Required
<p>Ask the Expert Sessions</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>Cost: Subject to Scoping</p>	TBC	Professional Services
<p>Customised Integrated Finance Export Tool</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>Benefits</p> <p>This will help to integrate into your end-to-end financial process</p> <p>Cost: Subject to Scoping</p>	TBC	One Integration Services
<p>IDACI integration for individual Spot or SFF payments</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>Benefits</p> <p>Reduction of manual processes of complex individual hourly rates or spot payments</p> <p>Cost: Subject to Scoping</p>	TBC	One Integration Services